



PRACTICE MANAGEMENT AWARD

JAMES L. UNDERWOOD, CPA/PFS, CFP®, AEP TARPLEY & UNDERWOOD FINANCIAL ADVISORS LLC, ATLANTA, GA



Jim Underwood and Harvey Tarpley, met at church when Underwood was young. When they started Tarpley & Underwood in 1978, they shared a desire to live out their faith in the marketplace. For many years, that faith was evidenced informally in their practice. However, a few years ago, in response to a desire to clarify the integration of biblical wisdom in their practice management, they formally defined their mission and core values around biblical principles. One of those core values is: "We are

focused on a world view that is guided by biblical principles and an acknowledgement of our Creator."

While Underwood and his fellow shareholders have long shared a relationship with Christ in common, clarifying their mission and core values has helped them be intentional in making biblically based decisions. They now:

- Have a benchmark for making decisions to ensure that their clients receive biblically based advice.
- Believe that by delivering professional services with excellence and integrity, doors will be opened and clients will be drawn to the biblical values that undergird his firm.

Additionally, as advisors practice from a Christian worldview, they, "earn the right to be heard" by their clients.

Underwood believes that integrating faith and practice is about "understanding and living biblical values, evidenced by how you treat and advise others." He says, "we bend over backwards to do what's the right thing for the client, as opposed to what might be in our financial best interest."

Jim Underwood, CPA/PFS, CFP®, AEP, graduated from Georgia Tech with an Industrial Engineering degree and received his MPA from Georgia State. He occasionally contributes to the Atlanta Business Chronicle, is a past president of the Georgia Society of CPAs, and is a past member of the governing council of the American Institute of CPAs. He and his wife, Kay, attend North Point Community Church, where Underwood serves as an elder, community group leader, and HOST Team member. He helps to lead a local study group for Kingdom Advisors, as well. Kay and Jim have three grown children: Elizabeth, Kathryn, and James.

2009 - John W. Moore, CIMA

2008 - Jerry Black

2007 - Randall P. Sanada, CFP®, CLU, ChFC, MSFS

2006 - Paul G. Anthes, CFP®

The vision of Kingdom Advisors is to equip and motivate Christian Financial Professionals to serve the body of Christ by implementing biblical wisdom into their lives and practices.

Christian financial professionals should not only be knowledgeable about the biblical principles that apply to the stewardship of God's resources, but also strive to integrate those principles into the advice they give to their clients. However, the application of biblical wisdom does not end with the client. It is essential for a Christian Financial Professional to incorporate these principles into the management and operation of their practice as well.

Kingdom Advisors created the Kingdom Advisors Practice Management Award to recognize Kingdom Advisors Members who have intentionally and systematically integrated their faith into their financial services practice.

The Kingdom Advisors Practice Management Award recognizes:

- Outstanding integration of biblical principles in practice management.
- Creation of a unique biblical culture which exemplifies Jesus Christ and results in a lasting impact on clients, staff, vendors, and community.
- A practice from which Kingdom Advisors members can learn from and emulate.

