SHERWOOD
FINANCIAL PARTNERS

Executive Bios

Matthew Davis

Short bio

Matthew Davis is co-founder of Sherwood Financial Partners, a boutique, multifamily office–style advisory firm serving high-net-worth individuals and families.

He works with clients navigating some of life's most significant financial decisions, including retirement, inheritance, family wealth transfer, charitable giving, and other major transitions. Through years of working alongside individuals and families, Matthew has found that financial decisions are rarely just about money. They are typically tied to family, responsibility, opportunity, and the legacy people hope to create. His work focuses on helping clients move forward with clarity, confidence, and a deeper understanding of what matters most.

Long bio

Matthew Davis is co-founder of Sherwood Financial Partners, where he works closely with individuals and families facing important financial decisions and life transitions.

His work centers on retirement, inheritance, family wealth transfer, charitable giving, estate planning decisions, and the responsibilities that accompany wealth. While these decisions may appear financial on the surface, Matthew has found they are often rooted in deeper questions involving family, values, relationships, and the future people hope to create.

This perspective helped shape Sherwood's philosophy of Living Legacy Planning™, which encourages clients to think not only about what they will leave behind but also about how their resources can support the people, experiences, and causes that matter most during their lifetime.

Matthew is known for his thoughtful approach to decision-making and his ability to help clients navigate complexity without losing sight of what matters most. His work

is grounded in the conviction that focused attention is one of the most valuable things an advisor can offer. By understanding the full context of a client's life—not just their finances—he helps individuals and families make decisions with greater clarity and confidence.

Under his leadership, Sherwood has developed a reputation for deep client relationships and an integrated approach that brings financial planning, tax expertise, estate planning coordination, and investment management together in service of the client.

Matthew frequently leads and contributes to conversations on retirement transitions, legacy planning, charitable giving, family wealth transfer, and the evolving responsibilities that accompany wealth.

Hannah Boundy

Short bio

Hannah Boundy is co-founder of Sherwood Financial Partners, where she guides the firm's approach to client relationships, education, and Living Legacy Planning.

A CFA charterholder with a deeply technical background in investments and financial analysis, Hannah brings both quantitative rigor and a strong understanding of the human side of wealth to her work. As a writer, educator, and advocate for financial stewardship, Hannah is particularly interested in the intersection of money, family, and the choices people make throughout their lives. Her work explores topics such as legacy, generosity, inheritance, family communication, and helping individuals approach financial decisions with greater clarity and confidence. Through her work with clients, writing, education, and involvement with Pepperdine University's business and student leadership programs, she has come to see focused attention as one of the most meaningful forms of care and an essential part of helping people make thoughtful decisions about money and life.

Long bio

Hannah Boundy is a co-founder of Sherwood Financial Partners, where she guides the firm's approach to client relationships, education, and Living Legacy Planning.

A CFA charterholder, Hannah brings a rigorous foundation in investment analysis, financial planning, and the quantitative disciplines that shape sound financial decisions. She is as comfortable working through the mathematics behind a plan as she is helping a family understand what that plan means for their lives.

Her work is rooted in the understanding that financial planning is ultimately about people. While money often sits at the center of important decisions, Hannah is drawn to the family dynamics, values, relationships, and life experiences that give those decisions meaning.

She believes strong planning requires both technical accuracy and a clear understanding of the people the numbers are intended to serve. That combination allows her to move between complex financial analysis and the personal conversations that often determine whether a plan succeeds.

Hannah writes and speaks frequently about legacy, stewardship, generosity, inheritance, family communication, financial decision-making, and the responsibilities that accompany wealth. Through her writing and client work, she encourages people to think beyond financial outcomes and consider the impact their decisions have on future generations, family relationships, and the lives they hope to build today.

Like the broader philosophy behind Sherwood, Hannah's work reflects a conviction that focused attention is one of the most valuable investments a person can make. She is passionate about helping individuals and families navigate important conversations, make thoughtful decisions, and engage more confidently with their financial lives.

In addition to her work with clients, Hannah serves on the Board of Advisors for Seaver College at Pepperdine University and two other nonprofits. She also supports student development through her involvement with Pepperdine's Women in Finance initiatives. She is also the author of A Gal's Guide to Personal Finance. Through her work with students, clients, and professional audiences, she regularly contributes to conversations around financial stewardship, legacy planning, family

wealth, investment and planning fundamentals, and helping individuals—particularly women—build confidence in their financial decision-making.

Her work reflects a simple truth: money is most meaningful when it is connected to the people, values, and purposes it is intended to serve.

Media resources

Executive bios, company information, media-ready headshots, brand assets, and additional resources are available at:

sherwoodfp.com/media.com

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