iWealth CORE VALUES STATEMENT

iWealth was founded in 1994, when I first started in the financial planning industry. The business has grown since and continues to adapt to change in the marketplace and community. The core values that were the foundation for iWealth at the beginning are still with us today.

Those core values are at the forefront of all that we do. They include acting with a servant's heart and being:

Humble

Hardworking

Trustworthy

Client-Centered

Although no one can predict investment outcomes, when we work side by side with our clients and exhibit these core values, we can rest assured that we are doing right by them. iWealth is here to serve our clients and help them with many areas of their lives, not just their finances.

We live by the golden rule to treat others how we want to be treated.

We have a purpose at iWealth that should resonate with everyone we work with.

Your needs: We listen, then ***simplify.***

At iWealth, when we have a team of people who carry our core values and work with our purpose, there is nothing we cannot do. They have been, and will continue to be, our guiding light. Let's all enjoy this ride of helping others pursue their dreams.

Brad Connors

Brad Connors
President

iWealth
Your Dreams Become Our Goals
Planning • Investments • Insurance

Securities and Advisory Services offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC.