iWealth Mission Statement

iWealth was created to help you manage risk while you invest wisely and live well.

We believe in the "golden rule" of treating others how we would want to be treated. We believe in helping our clients to not run out of money, to manage risk and to transfer wealth to whom they feel appropriate.

We serve individuals and small businesses that are looking for clarity when it comes to their financial situation. People need to find a team they can trust, one with integrity and transparency.

We consistently do an excellent job of serving others for the greater good of society. We believe we were put here to educate people on how to protect their family's wealth.

Our clients can expect highly customized service with our firm. We help them understand exactly where they are, where they are headed and how to get there. This is done by reviewing and implementing our "13 Wealth Management Issues" that our research has shown so valuable to our clients.

iWealth
Your Dreams Become Our Goals

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www.iwealth4me.com

iWealth is proud to be a member of **Investment Centers of America, Inc.'s** distinguished network. ICA has been a leading provider of investment and insurance products through community banks and independent offices since 1985. With almost 400 professionals, ICA uses a client-focused approach to support financial advisors in meeting their customers' goals. ICA provides a variety of solutions and services, ranging from securities and mutual funds to life insurance, long-term care and annuities.

BRAD CONNORS
Certified Wealth Strategist®

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Brad Connors has been an investment representative since 1994 and advises individuals, corporations and institutional investors. He believes in the "golden rule" of treating others how he would want to be treated — helping clients to not run out of money, to manage risk and to transfer wealth to whom they feel appropriate.

Maintaining clients' trust and taking the time to understand their individual needs are Brad's top priorities and the foundation of iWealth's highly personalized processes: iPath ™ and iBuckets™.

When you work with Brad, you can feel confident that you are working with a true professional. Here are just a few of his many accomplishments:

- 2012 & 2013 Twin Cities Five Star Wealth Manager Award Winner
- Investment Centers of America, Inc. 2010 Representative of the Year
- Received Certified Wealth Strategist® designation in 2008
- 2007 Top 50 Bank Advisors in the Nation by *Bank Investment Consultant*
- 2006 Top Ten Young Minnesotans by Minnesota Jaycees
- Investment Centers of America Leadership Council
- Consistently in top 5% of Investment Centers of America Representatives
- First National Bank of Waseca – Board of Directors
- Jobs Plus - Board Member
- American Red Cross - Board Member

At iWealth, Your Interests Come First...

- Adequate life insurance, disability and long-term care coverage to help protect your assets and reduce the risks from unforeseen circumstances.
- Cash flow analysis, saving and investing strategies, and asset allocation review to ensure asset and debt management.
- Tax-managed, tax-efficient, tax-deferred and tax-free investing for effective income tax management.
- Custom-designed retirement plans, strategies and allocation of resources for successful retirement planning and management to ensure your life's financial goals.
- Beneficial distribution options for individual's assets to future generations and/or charities, providing true legacy options.

Our Processes...

Today's economic climate offers unprecedented opportunities. At iWealth, our mission is to help clients take advantage of those opportunities by guiding them along our unique processes:

iPath:
An eight-step process designed and developed by iWealth to help determine and track your financial goals. Throughout the process, we will provide a well-defined road map for achieving all of those goals. You can expect to receive ongoing advice and professional service to help fine-tune your road map when it needs to change.

iBuckets:
During our detailed discussions with you, we uncover what your financial dreams and goals are. We then help you attach your money to your long and short-term goals and track how their funding is progressing.

iWealth

Your Dreams Become Our Goals

"Our commitment is to provide a superior level of customer service by listening to and addressing the specific needs, concerns and goals of each client."

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