Looking to join a successful team?

iWealth

Your Dreams Become Our Goals

Planning • Investments • Insurance

Partnership Agreement

iWealth™ Models

Having your own customized investment models allows you to put yourself in the driver's seat and differentiate yourself to your client. We have a time tested process and track record that is replicable by you and your team.

iPath™

We have created a proprietary process called iPath™ that will separate you from your competition. This is a process, not a product, and by using it you will not be just another investment advisor representative – you will stand apart from the competition.

Office Procedure Manual

We have produced a document that is useful for your entire office. With advice on best practices and how to go from A to Z, this document will help your team stay on top of everything in your office.

iBuckets™

Have conversations with your clients that other advisors are not having. Walk your clients through a discussion about goals and then how to organize and keep score on those goals.

The Sales Process

We will teach you how the sales process works and help you make it your own. You will then have the structure in place to repeat it day in and day out, with the goal of increasing your efficiency and income along the way.

iLife Planning Guide™

This document has been developed over the past decade and will help you have the most meaningful discussion with your clients. They will feel organized and will appreciate it each time you go through this with them.

Marketing

We will assist your office in getting together your targeted marketing calendar. You will have a track to run on for the entire year with time tested activities to help grow your business.

Your Team

You will have access to the "iWealth Team." Our team has many years experience running a financial planning process, and having us on your side will help to keep your business on track and growing.

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