



**24
YEARS**

7 TEAM MEMBERS

- WEALTH PLANNING
- CLIENT SERVICE
- OPERATIONS
- RECEPTION/MARKETING

2 WEALTH ADVISORS

- BRAD CONNORS AWARDS:**
 FIVE STAR AWARD WINNER
 2018, 2017, 2016, 2015, 2014, 2013, 2012¹
-
- 2014 SPIRIT OF ICA
 AWARD WINNER²
-
- 2014 AUTHORED
*FISH DON'T CLAP:
 PLANNING FOR A
 PURPOSEFUL RETIREMENT*
-
- 2010 ICA REP OF THE YEAR³
-
- 2007 TOP 50 BANK
 ADVISORS IN THE NATION⁴
-
- 2005 TOP TEN YOUNG
 MINNESOTANS⁵
-

15 STATES
 iWealth works with clients living around the USA

GLOBAL
 The advisors at iWealth have access to hundreds of investment products providing diversification across the globe.

\$150
 WE COLLECTIVELY SERVE MORE THAN 150 MILLION IN BROKERAGE AND ADVISORY ASSETS THROUGH LPL FINANCIAL



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

1. Award based on 10 objective criteria associated with providing quality services to clients such as credentials, experience, and assets under management among other factors. Wealth managers do not pay a fee to be considered or placed on the final list of 2013, 2014, 2015, 2016, 2017, 2018 Five Star Wealth Managers. 2. The Spirit of ICA Award recognizes an individual who exemplifies ICA's core values, while constantly searching for new ways to give back to the communities in which they live and work. Investment Center's of America (ICA) is not affiliated with LPL Financial. 3. 2010 ICA Representative of the year is based on annual production and representing the culture and personality of ICA. 4. Bank Investment Consultants ranked bank and credit union advisors by assigning a score between 1 and 11 on the following 6 variables: (1) assets under management; (2) trailing-12 month production; (3) percentage increase in AUM from the previous year; (4) percentage increase in T-12 production; (5) amount of fee business; and (6) the ratio of production-per-AUM. 5. Ten Outstanding Young Minnesotans (TOYM) program recognizes young leaders between the ages of 18-40 who have devoted themselves to improving their community. The program acknowledges the efforts and accomplishments of young adults who have contributed to the state through their service, thought and influence, community involvement, or entrepreneurship.