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 manage their family's wealth.

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

iWealth
Your Dreams Become Our Goals
Planning • Investments • Insurance

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For more information about LPL Financial, visit www.lpl.com.

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 years is based on annual production and representing the culture and personality of ICA. Investment Centers of America (ICA) and LPL Financial are separate entities. 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.

BRAD CONNORS
President

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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:

Awards

- 2018, 2017, 2016, 2015, 2014, 2013 & 2012 Twin Cities Five Star Wealth Manager Award Winner[1]
- 2014 Spirit of Investment Centers of America, Inc. Award Winner[2]
- 2010 Investment Centers of America, Inc. Representative of the Year[3]
- 2007 Top 50 Bank Advisors in the Nation by *Bank Investment Consultant*[4]
- 2005 Top Ten Young Minnesotans by Minnesota Jaycees[5]

Accomplishments

- Author of *Fish Don't Clap: Planning For A Purposeful Retirement*

Service

- Waseca Rotary Club Board Member
- Waseca Area Caregivers Board Member
- Mayo Community Development Committee Board Member

At iWealth, Your Interests Come First...

- Adequate life, 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 Planning for effective income tax management.
- Custom-designed retirement plans, strategies and allocation of resources for effective retirement planning and management to pursue your life's financial goals.
- Beneficial distribution options for individuals' assets to future generations and/or charities, providing true legacy options.

Our Processes...

At iWealth, our mission is to help clients take advantage of those opportunities by guiding them along our unique processes:

iPath:

A unique eight-step process designed and developed by iWealth to help determine and track your financial goals. Throughout the process, we provide a well-defined road map for pursing 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.

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"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." — Brad Connors

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