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 strive to 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 ways that may help them get there. 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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(507) 835-9111

www.iWealth4me.com

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

Brad Connors – President

Brad is the President of iWealth, with over 25 years' experience advising individuals, corporations and institutional investors. Maintaining clients' trust and taking the time to understand their individual needs are Brad's top priorities. When you work with Brad, you can feel confident that you are working with a true professional.

Brad resides in Waseca with his wife Trudi, and their two children. In addition to golfing, hunting, fishing and traveling with his family, Brad enjoys being active in the community through his involvement as board member of multiple businesses and volunteer organizations.

Shawn Pomeroy – Professional Plan Consultant™

Shawn's main focus is to provide financial planning and goal based investment advice to individuals and business retirement plans sponsors with plan design and enrollment and ongoing compliance. We understand there are many investment choices to make over your lifetime. By placing your goals first, and taking the time to understand the available resources, and your desires, Shawn can help you to be confident in the financial decisions you make.

Shawn resides in Waseca with his wife, Tracy and their two sons. In his spare time, Shawn is an active leader with the Boy Scouts of America as a member of the Twin Valley Council Board of Directors and as Scoutmaster of Troop 85.

A Team Approach

At iWealth, we have made a commitment to excellence in everything we do. Our goal is to exceed our clients expectations at all times. We have assembled a knowledgeable team of advisors and support personnel, and believe each individual plays an important role in meeting your needs. We feel that this team approach allows us to provide better service to you and also allows you access to subject matter professionals whenever you need it.

In addition to our two Wealth Advisors, the iWealth team consists of six highly qualified Client Service Assistants. Our seamless, proactive approach to client service is all about helping you save time and worry. We can help manage all of your financial investment needs, eliminating complexities associated with working with more than one company.

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 comprehensive 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 pursuing 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."

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