



**26  
YEARS**

**8 TEAM MEMBERS**



**WEALTH  
PLANNING**



**CLIENT  
SERVICE**



**OPERATIONS**



**RECEPTION/  
MARKETING**

**3 WEALTH  
ADVISORS**



- BRAD CONNORS AWARDS:**  
**FIVE STAR AWARD WINNER**  
 2019, 2018, 2017, 2016, 2015, 2014,  
 2013, 2012<sup>1</sup>
- .....
- 2014 SPIRIT OF ICA  
AWARD WINNER<sup>2</sup>**
- .....
- 2014 AUTHORED  
FISH DON'T CLAP:  
PLANNING FOR A  
PURPOSEFUL RETIREMENT**
- .....
- 2010 ICA REP OF THE YEAR<sup>3</sup>**
- .....
- 2007 TOP 50 BANK  
ADVISORS IN THE NATION<sup>4</sup>**
- .....
- 2005 TOP TEN YOUNG  
MINNESOTANS<sup>5</sup>**
- 

**20 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.



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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, 2019 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.