YOUR ROAD MAP TO PURSUING FINANCIAL STABILITY BY iWEALTH™

iPath™

iDiscussion iLife Planning Guide iGap iSolutions i Discover iTrack iValue iFirst

iWealth

Your Dreams Become Our Goals

Planning • Investments • Insurance

Since 1994, my clients have communicated to me the need for a process that will help them make their financial dreams a reality. I have constructed the iPath process to help families and small businesses pursue just that.

Bradley E. Connors
President

iPath™ is a personalized process designed and developed by iWealth to help guide you along your lifelong financial path.

Start your journey through eight steps along the path...

1 iDiscussion™

We will have a detailed discussion about your financial dreams, goals and objectives. We focus on your financial challenges, opportunities and strengths that can affect your overall financial strategy.

2 iLife Planning Guide™

The iLife Planning Guide helps you align your financial behaviors with your goals and will be used in all meetings with our team. This step is designed to help you stay on the path you have chosen but allows for changes based on your current situation.

3 iGap™

After reviewing your current financial situation and goals, we will work along side of you to identify the GAPS that you might have in your overall plan. Together, we will then discuss these GAPS and possible solutions.

4 iSolutions™

iWealth gives you implementation solutions and a recommendation schedule of all necessary actions. We promise to do everything possible to communicate these solutions effectively as they become apparent. We make certain that you understand what you own and why.

5 iDiscover™

Our proprietary tool FDC Plan on Purpose was designed by iWealth to help identify, track, and record the key wealth management concerns that need to be addressed during your lifetime. The Lifetime Plan Score™ is a great visual representation of the progress we are making with your overall plan.

6 iTrack™

The iTrack wealth management tool allows you to keep track of your entire wealth plan. This enhanced system consolidates all of your assets into a web-based portal that allows you to review your Life Balance Sheet anytime you would like. A personal Vault is available to house your planning documents and any other records of importance. We will monitor the portal along with you.

7 iValue™

At iWealth we provide you with value along with your investments. Advisory fees are based on the assets invested with us. We are not a firm that charges outrageous fees for our advice.

8 iFirst™

Our team believes in the Golden Rule. At iWealth, you can expect to receive our respect and appreciation when we work with you and your family in pursuing your goals. Your needs always come first at iWealth.

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