Advocating for YOU through every stage of life

LPL Financial

How We Work

Confidentiality

Topics we discuss today and in the future will be held in confidence.

Customized Strategies

After reviewing the specifics of your financial situation, we mutually determine which, if any, of our services might be appropriate for you.

Compensation

Our compensation is contingent upon the services our clients select.

1) Fees*
2) Commissions

Advocacy Rules

1) It's your money, we will treat it that way.
2) All costs will be discussed so you understand the value, before moving forward.
3) We use the same products and services as our clients.
4) We work hard as advocates for you, you become advocates for us and our process.

*Deduction of fees will impact overall account returns.

Comprehensive Strategy

Introduction

- Your Concerns
- Share Our Process

Gather Facts

- Establish Goals & Priorities
- Gather Hard and Soft Data

Analyze

- Organize Data
- Examine Information
- Prioritize

Considerations

- Review Strategies and Suitable Solutions

Implementation

- Adopt a Strategy
- Select Suitable Recommendations

Periodic Strategy Meeting

- Assess Personal Changes

This graph shows many of the financial areas that may be considered in a comprehensive strategy to establish financial priorities and provide a proper course of action.

*The financial analysis and recommendations are not intended to replace the need for independent tax, accounting or legal review. Individuals are advised to seek the counsel of such licensed professionals.

Helping people define, realize and protect their dreams

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Mark was born in Des Moines, Iowa. Married with 2 children, Mark volunteers for various charities, enjoys activities with family, playing golf and traveling.

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Tyler is married to his wife Brittaney and has three dogs. In his free time, Tyler enjoys hunting, golfing, traveling and watching Iowa football.

We are excited about the future. Our focus is on building life-long relationships with our clients while becoming a valuable resource to families and businesses as their needs change through the years.

Services we provide:

- Cash Flow Analysis for Household & Businesses/Institutions
- Educational Funding
- Charitable Gifting Strategies
- Risk Management
- Asset Allocation
- Retirement Planning
- Investing
- Insurance
- Estate Analysis
- Wealth Management

Products we provide access to:

- Brokerage
- Investments
- Mutual Funds
- Long Term Care Insurance
- Life & Disability Insurance
- College 529 Savings Plans
- UTMA/UGMA's
- 401(K)
- Group Benefits
- Annuities

PEOPLES
FINANCIAL CENTER
LPL Financial

Office locations in Clive, Jefferson and Waukee.
Meetings at other Peoples Bank locations by appointment.

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