



# Our Approach to Your Personalized Plan

We use a client-centric process focused on pursuing specific milestones we create together. Our comprehensive, step-by-step planning process is designed to help identify your needs, implement your strategy and monitor it to help you stay on course.

### Introduction

Identify your concerns and share our process.

### Gather Facts

Gather the hard and soft data. Goals and priorities are established.

### Analyze

We organize the data, examine the information and prioritize.



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### Considerations

Review strategies and suitable solutions.

### Implementation

Adopt a strategy, select suitable recommendations.

### Periodic Strategy Meetings

Assess personal changes and make adjustments.



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We invite you to call us at (515) 327-7742 or see our email below to schedule a consultation and discover how we can help you pursue your financial goals.



Be Confident About Your Retirement

The SmartVestor Program is a directory of investment professionals. Neither Dave Ramsey nor SmartVestor are affiliates of Peoples Financial Center or LPL Financial.

# Our Services

Cash flow Analysis • Wealth Management • Retirement Planning • Estate Analysis • Risk Management • Charitable Giving Strategies

## Complimentary Analysis

- Investment(s) – portfolio analysis, asset allocation, personalized re-balancing and portfolio risk
- Insurance – Buy-Sell policies, Key-person and other business owned insurance
- Employer Sponsored Retirement Plans – 401(k), SEP IRA, SIMPLE IRA or looking to get one started

## Client-focused Wealth Management

Peoples Financial Center focuses on you and the unique set of financial circumstances you, your family and business face. Getting to know you and understanding your personal needs allows us to create a customized wealth management strategy aligned with your short-and long-term objectives. By building a lasting, personal relationship with you, we're able to help you anticipate needs and plan for the future.



### Clive Branch

12701 University Avenue  
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Phone: 515-327-7742

### Jefferson Branch

116 W State Street  
Jefferson, IA, 50129  
Phone: 515-327-7742

### Waukee Branch

1185 SE University Avenue  
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Other Locations available by appointment only

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Not a Deposit	Not Insured By Any Federal Government Agency	