## IAMS | Wealth Management

#### www.iamswm.com

# The Benefits of Working With an Investment Advisor



#### What We Deliver as an Investment Advisor

Whether we are helping you plan for your retirement or save for your children's education, YOUR objectives are OUR objectives:

- As an Investment Advisor, it is our fiduciary duty to act in your best interest—we are legally bound to put our clients' interests first
- We will take the time to understand you and your specific financial situation
- We will strive to ensure your needs are being met through a personal relationship and committed pursuit of your investment goals
- We will make portfolio recommendations consistent with your objectives

#### Personalized, Focused Financial Advice

Our compensation for asset management services is aligned with your goals:

- We charge for our services based on a percentage of your assets managed It is important to us that your investments continue to grow
- We are required to disclose how we are compensated so you can give consent on financial products where a commission may be involved

### Questions You Should Ask Yourself:

- 1. What am I looking for Assistance with buying/selling individual securities, investment advice, or both?
- 2. How do I want to pay my financial professional? Fees? Commissions?
- 3. Do I want to take a longer-term, holistic approach to management of my investments or make it more transaction orientated?
- 4. How important is it that my financial professional have a fiduciary responsibility to put my interests first?

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#### **CONTACT US**

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