How do you benefit by partnering with IAMS Wealth Management?

- Our commitment to providing a comprehensive and transparent investment solution.
- Our broad product offering customized to your specific needs.
- The security of your assets (Securities held at TD Ameritrade Institutional)
- Our technology and support

Roles and Responsibilities for Your Account at IAMS Wealth Management

Your Advisor

Your advisor is the relationship manager that works directly with you to help establish your account by understanding your goals and risk tolerance. Additionally, your advisor will service your accounts, and conduct ongoing reviews to ensure your accounts held at IAMS Wealth Management are within the established parameters set during your initial consultations.

IAMS Wealth Management

Provides access to institutional–quality money managers, total portfolio solutions, ongoing research, portfolio optimization, online account access, and performance reporting and reconciliation.

Portfolio Research and Analysis

Institutional money managers provide IAMS Wealth Management with our models, trade-order management, and ongoing market recaps and analysis.

TD Ameritrade Institutional

With TD Ameritrade Institutional, your money is with one of the world's largest discount brokerage firms. With that comes a commitment to both excellent client service and account information protection. While no security system is absolutely impenetrable, TD Ameritrade has made substantial investments in leading-edge security software, systems and procedures – and is constantly reviewing, refining and upgrading its infrastructure.

About IAMS Wealth Management

IAMS Wealth Management is a financial services organization where capabilities and systems can create results for both our network of advisors and our mutual clients.

IAMS | Wealth Management

505 North 210th Street
Elkhorn, NE 68022-4609
P: 888.255.7670
F: 402.330.7296
E: info@iamswm.com

Investment advisory services offered through IAMS Wealth Management, LLC, an SEC Registered Investment Advisor firm. SEC registration does not constitute an endorsement of the firm by the Commission nor does it indicate that the advisor has attained a particular level of skill or ability. All investment strategies have the potential for profit or loss.

IAMS | Wealth Management

You Have a Relationship with Your Advisor

Your Advisor Has a Relationship with IAMS Wealth Management

How do you feel your advisor should be compensated?

Whenever you purchase a security, your broker charges you a fee, regardless of the securities performance or suitability.

or

If the advice they provide you leads to positive results, your advisor is compensated a higher fee, and if negative results occur, the result is a lesser fee.

The Commission-Based Broker

A commissioned broker makes commissions on purchases and sales of securities. Compensation isn't tied to client's goals or overall account value, so there is a potential conflict of interest with compensation and no guarantee the interests are properly aligned with the client.

We are Fee-Based Advisors

All interests are properly aligned with the client, and all fees are properly disclosed in the Form ADV Brochure. IAMS Wealth Management advisors charge a flat annual percentage fee for their services, which is fully disclosed when establishing your relationship with your advisor.

Working with IAMS Wealth Management

Strategic Partnerships

IAMS Wealth Management has partnered with experienced money managers to provide research on our investment strategies.

Product Capacity

Our investment platform includes 10 profiles that span the risk spectrum and consist of domestic equity and fixed income strategies.

Maximized Suitability

Through IAMS Wealth Management's strategic partnerships and product capacity, our advisors are able to offer independent advice based on your goals.

The IAMS Wealth Management Investment Process. Your portfolio, built around your goals.

Goal Discovery

This is the first and most important step when establishing a portfolio. Without an understanding of what is important to you about your account with IAMS Wealth Management, your financial professional cannot create a suitable solution for you to achieve your goals.

Risk Assesment

Your advisor will conduct a thorough risk assessment to determine an appropriate risk level for your account. Understanding your risk tolerance will help your advisor customize a solution intended to help you reach your goals while maintaining a risk tolerance you are comfortable with.

Recommendation Review

Your advisor will provide you with a comprehensive risk analysis of your current portfolio. Additionally, present side-by-side options that match your goals and risk tolerance.

Implementation

Your advisor will work closely with IAMS Wealth Management to implement your customized investment strategy. IAMS Wealth Management will execute trades and run various quality checks to ensure that your account is properly implemented.

Ongoing Portfolio Review

As part of IAMS Wealth Management team, your advisor will work to conduct ongoing reviews of your account to ensure that your portfolio stays focused on your goals and within your assigned risk tolerance.

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