FIRST WEALTH

FINANCIAL GROUP LLP

Building Wealth & Relationships

Who We Are

First Wealth Financial Group is locally-owned and partners with one of the nation's largest broker-dealers (LPL Financial) to serve clients in all stages of life. We believe what sets us apart from other financial advisors is our knowledgeable, down-to-earth, experienced professionals who understand our clients want to have confidence, clarity and comfort when it comes to their financial lives.

Clients We Serve

Expanded Millennials (typically ages 25-45)
Pre-Retirees (typically age 45 – retirement)
Retirees

How We Work Together

- We offer a complimentary initial client meeting to learn about an individual's goals and/or concerns and to discuss how we bring value to them through our expertise and verifiable recommendations. This sets the stage for how we proceed.
- Clients receive a private web page that shows all of their financial accounts in one place, with one sign-on and one password.
- We sit down with clients for periodic reviews and are available anytime for general financial questions (e.g. what mortgage to consider, various ideas for purchasing a car, how to buy a second home).

Products We Offer Access To

Investments
- Managed accounts
- Equities, fixed income, mutual funds
- Alternative investments

Insurance
- Life
- Long-term care
- Disability

Annuities
- Deferred - variable, indexed and fixed
- Income - immediate, specified or lifetime guaranteed

Services We Offer

Retirement Planning using Our Planning Model
FWFG Retirement Model
FWFG Smart Retirement Booklet
FWFG Pension Lump Sum Analysis
FWFG Retirement Income Spreadsheet
FWFG Asset & Income Model

Expanded Millennial Planning
FWFG Retirement Review
FWFG College Spreadsheet

Legacy Planning
Tax-free estate review
Estate planning strategies
Required Minimum Distribution (RMD) planning

Executor and Beneficiary Services (complimentary)
Assistance with completion, processing, and tracking of forms related to estates and inheritances
Access to our private meeting rooms for gatherings with attorneys and family members
Use of FWFG office equipment for copying, faxing, scanning, etc.

Our Door Is Open

Our team is known for helping, educating, and supporting clients as we work with them to develop strategies for today and for the future. An informed decision is the best decision. Contact us to schedule a complimentary consultation. We'd love to meet you, answer your financial questions and learn how we can help.

- Email us at brook@firstwealthfinancialgroup.com
- Call us at 563-242-1885 or 800-598-2141
- Stop by the office at 1210 19th Ave NW, Clinton, IA – on the bypass

First Wealth Financial Group LLP
1210 19th Ave. N. Clinton, IA 52732 | (563) 242-1885
www.firstwealthfinancialgroup.com

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