

Top 8 Best Financial Advisors in Iowa (Des Moines, Ames, Dubuque, and Davenport)

2016 RANKING OF TOP WEALTH ADVISORS

Finding the Top Financial Advisors in Des Moines, Ames, Dubuque, and Davenport (Iowa)

Making the decision to hire a financial advisor in Iowa opens up a whole world of options and details that you didn't even know mattered. Before you can choose a financial advisor, you must know where to look! You can spend days or even weeks gathering enough information about Iowa-based financial advisors, but that would still only put you at the beginning of your journey.

Next, you would have to know what criteria you should apply during your search and actually apply that criteria to narrow down a long list of options to the select few financial advisors who stand independently and offer superior financial management.

Financial advisors in Iowa vary in the services they offer, the types of clients they work for, and most certainly in what—and how—they charge (do you know the difference between fee-only and fee-based financial advisors?). You will undoubtedly come into this with many questions, and that's great! You may ask, "Do I need to have a minimum amount of investable assets?" or "Does a financial plan include investment or retirement planning services?"

You'll quickly see how important it is to approach the situation with a knowledgeable eye, and this is where Advisory HQ comes in! We have done the hard work for you with a stringent system that allows us to pinpoint the very best financial advisors in and around Des Moines, Iowa, for your consideration.

Best of all, our reports are **published for free**, and we do not accept any fees for the financial advisor and investment manager reviews and rankings that we publish. This is to ensure the highest level of objectivity and unbiased editorial reviews.



AdvisoryHQ's List of the Best Financial Advisors in Iowa

- **BTC Capital Management**
- **Chartered Financial Services, Limited**
- **Foster Group**
- **HJN Advisors**
- **Marrs Wealth Management, LLC**
- **Quad Cities Investment Group**
- **Steele Capital Management**
- **Syverson, Strege & Company**

This list is sorted alphabetically (click any of the names above to go directly to the detailed review section for that advisor)

Top 8 Financial Advisors in Des Moines, Ames, Dubuque, and Davenport, IA

(List is sorted alphabetically)

No.	Firm	Location
1	BTC Capital Management	Des Moines
2	Chartered Financial Service, Ltd.	West Des Moines
3	Foster Group	West Des Moines
4	HJN Advisor	Des Moines
5	Marrs Wealth Management, LLC	Ames
6	Quad Cities Investment Group	Davenport
7	Steele Capital Management	West Des Moines, Dubuque
8	Syverson Strege & Company	West Des Moines

Methodology: Finding the Top Financial Advisors in Des Moines, Ames, and Other Cities in Iowa

What methodology did we use in selecting this list of the best financial advisors in and around Des Moines and top wealth managers in Iowa?

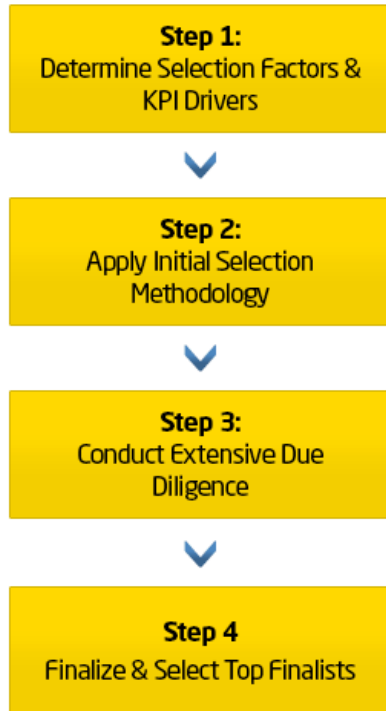
Using publicly available sources, AdvisoryHQ identified a wide range of financial advisors, asset and wealth managers, and financial planners that provide services in Des Moines, Ames, Dubuque, and surrounding areas in Iowa.

We then applied AdvisoryHQ's [Breakthrough Selection Methodology](#) to identify the final list of top advisors that provide services to communities in and around Des Moines.

Methodologies For Selecting Top Advisors/Wealth Managers

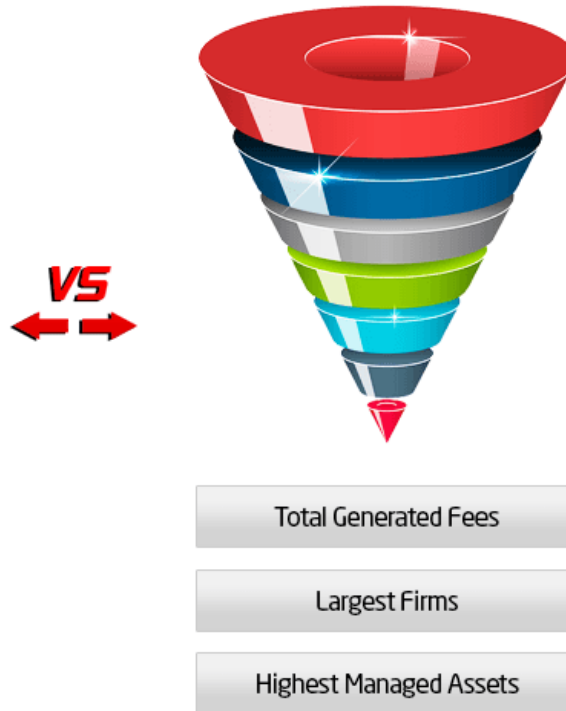
Breakthrough Top-Down Methodology

ADVISORYHQ



Traditional Process

Other Firms



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Detailed Review – Top Ranking Financial Advisors in Iowa

Below, you will find a comprehensive review of each firm that ranked on our list of top advisors and financial planners in Des Moines, Ames, Dubuque, and Davenport. We carefully detail the factors that we think are important and that allowed these Iowa financial advisory firms to score well in our selection ranking.

BTC Capital Management Review

BTC Capital Management is an investment management firm located in Des Moines, Iowa, but they also serve clients in Arizona, Illinois, Missouri, Minnesota, and South Dakota. They are a well-known institutional sub-advisor and also extend services to high net-worth individuals.

They proudly offer clients a wide variety of investment management solutions that include both proprietary and non-proprietary investment strategies such as equity investing.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled BTC Capital Management to rank as one of 2016's top financial advisory firms in and around Des Moines, Iowa.

A Registered Advisor:

BTC Capital Management stands as both a Registered Investment Advisor (RIA) and an SEC-registered advisor. Their voluntary affiliation with these entities shows the dedication and quality of service that they strive to provide for their clients.

A Firm Commitment to You:

With literally thousands of financial management and investing firms out there, why should you choose BTC Capital Management? They believe their commitment-based philosophy sets them apart from most other firms. Here's a look at just some of the ways they are committed to you:

- Deliver measurable results consistently
- Providing the highest quality in personalized investment solutions
- Uphold the highest ethical standards
- Maintain and add to our rich body of technical knowledge

The Four Tenets of Investing:

Utilizing a highly-disciplined approach in managing client portfolios, BTC Capital Management adheres to the following four investment tenets:

- In market downturns, preserving capital and investment value is paramount.
- Strong fundamentals are the primary foundation for all investment decisions.
- Short-term “noise” in the market must be filtered out in order to focus on long-term growth and prudent investment decisions.
- Portfolio risk is balanced through sector weight constraints, name limitations, and other portfolio based factors in a manner appropriate for each client’s objectives.

Fixed Income Investments:

It takes a lot of knowledge and thoughtful planning to meet the needs and expectations of large entities such as banks, insurance companies, and trusts. Therefore, BTC Capital Management offers a highly disciplined fixed income investment approach that focuses on managing benchmark sensitive portfolios. However, due to the varied nature of a client’s needs, portfolios are customized on a case-by-case basis to suit the specific objectives of each client.

Equity Investments:

Even with a stable economy, equity investing can be risky. BTC Capital Management works closely with each client to create investment portfolios that are focused on long-term goals. High-quality companies that offer attractive valuations and significant growth potential are among the most utilized. Analytical techniques are quantitative, qualitative, and fundamental.

Your Advisory and Consulting Team:

The advisory and consulting team at BTC Capital Management is comprised of a highly expert and sophisticated team. These managers can be integrated into an existing portfolio allocation or they can be totally independent of the firm’s internally managed offerings. Either approach serves to offer the maximum level of knowledge and experience needed by each client.

Chartered Financial Services, LTD Review

Founded in 1982, [Chartered Financial Services, LTD](#) has been fiercely protecting their clients' right to independent and objective financial advice for over 30 years. Located in West Des Moines, Iowa, Chartered Financial offers a variety of financial planning services to businesses, individuals, and plan sponsors.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below you will find key factors that enabled Chartered Financial Services, LTD to rank as one of 2016's top eight financial advisory firms in and around Des Moines, Iowa.

Over a Century of Expertise:

The small team at Chartered Financial Services brings with them over 100 years of combined financial experience. They are rooted in professionalism and trust and stand as a strong model of the company's continued success.

Further exemplifying their range of knowledge and expertise is a host of accreditations, which include Certified Financial Planner (CFP), Accredited Investment Fiduciary (AIF), and Registered Planner (RP).

A True Fiduciary:

The driving force behind Chartered Financial Services has always been providing independent fiduciary services that focus on the financial goals of the client, not on selling advice and services based on a third-party association. Building trust is an essential component of a successful relationship, and you will always be aware of all of your financial options, not just ones that only benefit your advisor.

Financial Services for Individuals:

Chartered Financial Services takes into account all aspects of your financial life when helping you to create a plan. Whether you are planning for college, retirement, or any stage in between, you can count on the knowledge and expertise of your advising team to guide you forward. The following is a sampling of their financial planning services:

- Comprehensive, fee-based financial planning
- Cash flow analysis
- Investment management
- Retirement planning
- Insurance
- Estate planning
- Education funding
- Tax-efficiency strategies

Services for Businesses and Plan Sponsors:

It is with great responsibility that businesses and plan sponsors must approach their organization's needs. Through prudent and actively managed services, Chartered Financial Services offers fiduciary oversight, independent investment due diligence, comprehensive feedback, and education for their clients. Service offerings include:

- Business consulting
- Vendor analysis
- Fiduciary review
- Retirement plan design
- Retirement plan advisory services
- ERISA 3(21) investment advisory fiduciary
- ERISA 3(38) investment management fiduciary
- Insurance
- Employee education

Strategic Partnerships:

In order to meet the intricate needs of business clients and various plan sponsors, Chartered Financial Services has partnered with two different organizations to bring you the highest level of service. They are:

- Retirement Plan Advisory Group (RPAG): RPAG is a national alliance of independent advisors that extend services to improve the

value of your financial plan by evaluating investments and recommending fund additions, subtractions, or substitutions.

- Cambridge Investment Research, Inc.: As a leading independent broker-dealer, Cambridge offers unbiased recommendations that allow complete freedom to customize portfolios that serve the best interest of the client.

Foster Group, Inc. Review

With over \$1.5 billion in assets under management, [Foster Group, Inc.](#) takes a holistic approach to financial planning, wealth management, and investment management. While they are based in West Des Moines, they work with nearly 1,000 clients across 37 states, which includes individuals and institutional organizations.

They stand as an independent, fee-only advisory firm that never lets their advice be clouded by outside influences. Gaining the trust of their clients through unbiased service is important to the team at Foster Group, Inc.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Next is a listing of the key factors that enabled Foster Group to rank as one of 2016's top eight financial advisory firms in and around Des Moines, Iowa.

Guiding Principles:

What makes the team at Foster Group different? Perhaps it's their desire to stand out from the crowd, to create meaningful client relationships, or to educate their clients. Everyone at Foster Group shares in the responsibility of ensuring your financial success. Their foundation is built on a vision and mission statement that aren't merely words on paper.

Each member of the team strives to be a true example of the principles that guide their culture, values, and work ethic. They proudly claim, "We will influence thousands of individuals, families, and organizations with

wise financial counsel, while encouraging the pursuit of meaningful living and generous giving.”

The People:

The men and women that represent the face of Foster Group are carefully selected to reflect the values of the firm. Foster Group says they are a group worth getting to know. In fact, they have managed to create such a well-supported team that their front-line of advisory staff has not seen a turnover in 25 years! That’s unheard of. However, it is further testament to the unique culture generated by Foster Group.

A Leader in the Medical Profession:

Over the last 25 years, Foster Group has become a leading advisory firm for medical professionals with over 40% of their managed assets coming from relationships with physicians. They extend to these clients wealth, investment, and retirement management services.

Individual Planning:



When working with individual clients and their families, Foster Group starts with two foundational concepts:

- Relationships Matter: Each individual client has a unique set of goals, expectations, and preferences. Only through a trusting

relationship can these vital characteristics be discovered. Beginning with the very first meeting, Foster Group strives for a personal and in-depth conversation that will draw out key values and goals for your financial plan.

- **Markets Work:** Everyday, all over the world, capital markets are hard at work. However, are those markets working for or against you? It is the goal of Foster Group to forge long-term alliances between capital markets and their clients in order to reach goals in an effective manner. Key concerns include preserving accumulated wealth, mitigating adverse tax situations, and creating sustainable lifetime cash flow.

From there, they create a customized plan that is tailored to encompass each individual client's needs.

The Institutional Approach:

With over 20 years of experience in serving institutional clients, it's safe to say Foster Group knows a thing or two. It's also worth noting that the very first institutional client they started serving in 1992 is still a client to this day!

HJN Advisors, LLP Review

Opening their doors in 2007 in the heart of downtown Des Moines, Iowa, [HJN Advisors](#) come armed with a collective 150+ years of financial experience. They offer a suite of financial planning, wealth management, and investment management services to executives, entrepreneurs, and affluent families alike.

The HJN team taps into an extensive network of professional relationships with attorneys, trust advisors, and financial experts to make sure clients have all the resources they need to succeed.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below you will find key factors that enabled HJN Advisors to rank as one of 2016's top eight financial advisory firms in and around Des Moines, Iowa.

An Experienced Team:

With over 150 years of financial experience, you can feel the prestige that stands with the team at HJN Advisors. Starting with their three founding partners, all the way down to their operational and administrative staff, the team has a variety of real-world experience which includes all areas of financial management, accounting, tax planning, technology, and more.

A Family Office of Services:

The wealth of your family is usually associated with a successful business venture. Wouldn't it make sense then to approach your financial plan with a thoughtful business approach? HJN Advisors certainly seem to think so. They've assimilated a functional process of discovery, analysis, solution design, implementation, and review in order to address every facet of your financial future. Below we will look at some of their specific wealth management categories:

- **Planning:** Partnering with clients to establish their needs, HJN Advisors seeks to create a plan that not only will get you from point A to point B, but one that will minimize distractions and detours that naturally occur during any particular stage of life and planning.
- **Family Governance:** Establishing rules and regulations that optimize your success and allow for honest communication are important. This is especially true when assets and business interests are transferred between generations. Through the facilitation of family meetings, clients have the opportunity to set the framework for their investments and determine roles and responsibilities within their plan.
- **Risk Management:** The tolerance of risks associated with investing and financial planning varies from client to client. HJN Advisors employs a data-based model that is both sophisticated and functional, and it allows clients to make informed decisions that will help to balance their risk.
- **Portfolio and Asset Management:** As you enter into the world of investments, it's important to have a clear objective for your income, your growth, your preservation, and your risk. With a system that

utilizes both visual and numerical data, your team of financial advisors stands ready to offer advice and help make sure your portfolio is regularly managed and reviewed.

- **Investments:** Never throughout history has investing been as flexible and variable as it is today. Understanding the ins-and-outs of traditional versus alternative investing requires an exceptional level of knowledge and expertise. Rest assured that HJN Advisors brings to the table just that. They offer everything from U.S. corporate bonds to equities and private placements.

Marrs Wealth Management, LLC Review

As an investor, you can go anywhere for financial advice, but do you know if the firm you are working with is one you can actually trust? At Marrs Wealth Management, LLC, this is the question they want to answer for you.

Based in Ames, Iowa, Marrs Wealth Management is an independent, privately-owned financial advising firm that offers investment advice, wealth management, and retirement planning to high net-worth individuals in order accomplish a common goal: securing your financial future and growing your assets in the process.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below you will find some of the key factors that enabled Marrs Wealth Management to rank as one of 2016's top eight financial advisory firms in and around Des Moines, Iowa.

Independence Is Its Own Reward:

Marrs Wealth is an independent, fee-only Registered Investment Advisor (RIA) and fiduciary. There are no shareholders calling the shots and no incentives that interfere with your best interest. As such, you remain their only concern.

Personal Wealth Management:

Expertly crafted and independent advice is curated by not just one member of the Marris Wealth team, but rather the whole organization.

Overseen by its two founding partners, they share a common vision with you and take the fiduciary responsibility of protecting your wealth very seriously. The following are just a few of the wealth management services available to you:

- Estate planning
- Tax management
- College funding
- Retirement planning
- Investment management

In-Depth Investment Approach:

Investments are naturally laden with taxes, fees, and inflation. Through substantial investments in both in-house and third-party researches, Marris Wealth is determined to maximize your risk-adjusted returns.

Investing with Marris Wealth allows you access to best-of-breed investments across a variety of playing fields, including traditional and alternative investments. To give you a better idea of what drives their investing practices, let's take a look at their disciplined investment philosophy:

- **Long Term Focus:** Investing is a long-term affair. Chase returns too quickly and you will be set up for disaster. Marris Wealth seeks out long-term performers based on your specific risk tolerances.
- **Manage Your Risk:** Diversification is key to minimizing risk. Through the use of a broad selection of asset classes, your investment portfolio should remain balanced and ready for change.
- **Maintain Diligent Oversight:** Change is inevitable; it *will* happen. What started as a good investment can quickly change along with your own personal needs. For this reason, every investment needs careful oversight to ensure your portfolio is performing at its best to meet your goals.
- **Put You First:** The fee-only model applied by Marris Wealth guarantees that you always come first and the advice you receive is unbiased and tailored to help you achieve limitless success.

- Retirement Planning: “Seeing the whole picture, taking the right steps.” That’s the basis of your retirement plan at Marrs Wealth. Their expert team is trained to assess your personal preferences, financial objectives, family situation, and risk tolerances. With this information, they work closely with you to meet your long-term expectations and allow for a worry-free retirement.
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Quad Cities Investment Group, LLC Review

As an independent firm, [Quad Cities Investment Group, LLC](#) treats what you’ve worked so hard to build with the utmost respect. Their client-focused approach and over 100 years of experience allows the firm to truly specialize in financial planning, portfolio building and management, and wealth protection.

Located in Davenport, Iowa, Quad Cities Investment Group works to improve the efficiency and safety of your financial journey—no matter what stage of life you are in.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled Quad Cities Investment Group to rank as a top 2016 wealth management firm in and around Des Moines, Iowa.

Education and Resources:

Being informed about what is happening in your financial world is an essential piece of the puzzle. You can’t make prudent financial decisions if you don’t have access to the information you need. Quad Cities Investment Group offers a variety of market commentary, research, and financial news on their website that is accessible 24/7 and can really help you understand your finances and the markets directly associated with them.

The Independent Standard:

As an independent firm and a Registered Investment Advisor (RIA), Quad Cities Investment Group is in a position to provide honest, personalized, and client-focused advice that is backed by an incredible century of experience and knowledge. They serve each client with the respect they deserve and never offer advice that puts anything but your best interest at the forefront of each situation.

The Planning Process:



Life is ever-changing. However, the bumps in the road should be nothing more than inconveniences. Through the application of four planning objectives, Quad Cities Investment Group stands prepared to take on anything that may come their way. The following information will give you a brief overview of their comprehensive system:

- **Listening:** The most important aspect of a plan is understanding the unique needs of every client. It starts with a conversation and turns into an analysis of your feelings regarding risks, goals, and current financial status.
- **Planning:** Once there is a clear understanding of your financial goals and circumstances, a long-term customized plan is created based solely on your financial well-being.
- **Guiding:** Planning is only the first step. Implementing your plan and guiding you through the process is vital. Circumstances can change, both personally and through market fluctuations. You will always

have full access to your portfolio and your financial advisor to discuss any concerns you may have. If you already have other trusted advisors, Quad Cities Investment Group will happily collaborate with those individuals as well.

- **Protecting:** When your plan is hard at work generating value, it must be approached with a disciplined investment management and rebalancing process. This is done through the use of investment strategies intended to hedge against certain market conditions. You are given complete, transparent performance reporting and your portfolio is regularly reviewed in order to chart the progress of your overall plan.

Individualized Strategies:

What kinds of financial services can you expect when doing business with Quad Cities Investment Group? Here is a sampling:

- Wealth management
- Risk analysis and insurance planning
- Education planning
- Cash flow and budget planning
- Legacy planning
- Retirement planning

Steele Capital Management, Inc. Review

Although [Steel Capital Management, Inc.](#) didn't formally open its doors until 1996, founding member Don T. Patrick Steele began his financial advising career all the way back in 1946! Not only has he pioneered the industry standard, five of Don's six children have followed in his footsteps, becoming some of the nation's most respected advisors.

Steele Capital runs offices in West Des Moines and Dubuque, Iowa, as well as a third location in Middleton, Wisconsin. However, they serve individuals and company-sponsored retirement plans all over the country.

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled Steele Capital Management, Inc. to be rated as one of 2016's top eight financial advisory firms in and around Des Moines, Iowa.

The Drive for Independence:

It should come as no surprise that a company rooted firmly in the belief that honest, long-term relationships are key to successful investing would also stand as an independent advisory firm. They follow a federally-mandated fiduciary standard and are a Registered Investment Advisor (RIA). Advice is always unbiased and never driven by the sale of another product.

Free Portfolio Review:

A few good firms will offer a free "second opinion" or review of your current financial portfolio. Steele Capital is no exception and they would be happy to analyze your current investment portfolio and provide you with a free written report. Sign up for this free service on their homepage.

Financial Planning and Wealth Management:

Basic wealth management is the hub of your financial portfolio. Account aggregation technology allows all of your assets to be linked to one source where all of your accounts are held. Accounts that can be linked include credit cards, life insurance policies, 401(K)s, and annuities.

You will also have access to all financial planning tools associated with your financial plan, and this allows you to "play" a little with certain concepts, such as determining your retirement risk. Your access to these tools also allows you to generate and print multiple reports and projections.

Take a look at some of the areas your Certified Financial Planner will work with you on:

- Cash flow management
- Social security maximization
- Tax strategies

- Education funding
- Retirement planning
- Estate planning

Maximized Social Security Benefits:

There seems to be a missing element between what most people THINK they know about Social Security and the actual rules that govern the program. Did you know there are over 8,000 possible claiming strategies that can be applied to your retirement plan? Without weighing all options and making informed decisions, you can be leaving up to \$100,000 sitting on the table! There are many questions to ask and considerations to be made, and the team at Steele Capital is ready to guide you through this daunting process.

Family Roadmap:

A conversation about death and what will happen to your estate when you pass is never an easy one. However, the conversation can be much more comfortable when you are still young. Even if you've put this off for too long, Steel Capital is there for you.

By creating The Steele Capital Management Family Roadmap, you will be appointed Financial Delegates who are responsible for organizing all of your financial information so there will be no burden of sorting through what you've left behind. When you are ready, so is your financial advising team.

Company-Sponsored Retirement Plans:

Steele Management is an expert in company-sponsored retirement plans. As a plan sponsor, you have a great responsibility not only to meet the needs of the employees, but those of the institution as well. Steele Capital offers security, convenience, and personalized service as they help you. What is included in such a plan? Let's take a look:

- Managed strategies
- Education and communication
- Plan design
- Recordkeeping and administration
- Revenue sharing
- Strategic alliances

Syverson Strege and Company Review

Syverson Strege and Company is a fee-only, independent financial planning and investment management firm located right in West Des Moines, Iowa. With their client-centric approach at the helm, they serve families and individuals with a variety of needs.

To offer the most concise investment management services, Syverson Strege and Company takes on the name Sherpa Investment Management when it comes to serving the investing needs of their clients (more details on this below).

Key Factors that Enabled This Firm to Rank as a Top 2016 Wealth Advisory Company

Below are key factors that enabled Syverson Strege and Company to be rated one of this year's top eight financial advisory firms in and around Des Moines, Iowa.

Honorable Designations:



A strong team is present on both the planning and investment sides of Syverson Strege. Along with a wealth of knowledge and experience, accreditations are many among the team and include the following designations:

- Certified Financial Planner (CFP)
- Certified Financial Analyst (CFA)
- Accredited Estate Planner (AEP)
- Chartered Advisor in Philanthropy (CAP)
- Heritage Design Professional (HDP)

Your Financial Plan:

Since they first opened in 1997, Syverson Strege and Company have been building a prestigious name for themselves. Along with their Advisor Committee, they are committed to serving the best interests of their clients.

Whether you are transitioning from one phase of life to another, experiencing complexities in your financial situation, or own a business, you can take advantage of a variety of services including:

- Income tax planning
- Pre- & post-retirement planning
- Cash flow management
- Philanthropic planning
- Investment management
- Estate planning
- Insurance planning

The Investment Side:

When investments are the topic of conversation, turn your attention to Sherpa Investment Management. Who are they? They're the same dedicated team of professionals already at your service, only with a different name to uniquely approach your investing needs. They remain independent and continue with a fee-only model, meaning it's still all about what is best for you.

The investment team serves individuals, families, endowments and foundations, charitable trusts, and non-profit organizations.

Portfolio Management:

Your investment portfolio is managed by TD Ameritrade. As a client, you will have constant access to all of your information, and you gain the benefit of having TD Ameritrade as an ally for all your investment needs.

Conclusion — Top Financial Advisory Firms in Des Moines, Ames, Dubuque, and Davenport (Iowa)

With all of the information presented to you about the top financial advisors in and around Des Moines, Iowa, you should have a pretty good idea of what is available to you. However, you may still find yourself with a few questions specific to your own personal financial needs.

Do you know what you want to gain from a relationship with a financial advisor in Iowa? Have you thought clearly about your current financial situation and where you want to be 10 years from now? How about 30 years from now?

If you find that you aren't exactly sure which services will best suit you, make a list! Sit down and take an objective inventory of your assets, the problems that surround each situation, and where you want to go from here.

Take your list and match it up with the Iowa-based financial advisors we've reviewed here, and see what similarities there are. Do you own a business and need specialized retirement services? Do you have a current investment portfolio but find that it has gone unmanaged too long and you are scared to see the damage? Each of your own personal situations, when carefully scrutinized, can help point you in the right direction.

Once you've picked out a firm or two, give them a call! Don't let this part intimidate you. After all, you can't have a successful or honest relationship with a financial advisor in Iowa if you don't feel comfortable even making that initial call. You'll probably be surprised by the level of friendliness you'll receive.

Don't forget that many financial advisors in Iowa offer a free consultation or "second look" at your current portfolio—take full advantage of this risk-free first encounter. While there is no one-size-

fits-all cap here, if you give it the proper time and considerations, you are sure to find one that fits.

We hope you have found this “Top Financial Advisors in Iowa” article useful.

If you have questions, comments, or tips about this review of the top Iowa wealth management firms and advisors, click below to send us an email.

Contact AdvisoryHQ

We look forward to hearing from you.

Cheers,
AdvisoryHQ Review Team