

Top 9 Best Financial Advisors in Des Moines, Ames & Davenport, IA | 2017 Ranking | Des Moines Area Wealth Managers

2017 RANKING & REVIEWS TOP RANKING FINANCIAL ADVISORS IN IOWA

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

Once you choose to look for a financial advisor in Iowa, a whole world of questions you never considered crop up. 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.

For instance, do you know the difference between fee-only and fee-based financial advisors?

You may also wonder whether you need a minimum amount of investible assets or if a financial plan includes investment and retirement planning services.

You'll quickly see how important it is to approach the situation with a knowledgeable eye. This is where Advisory HQ comes in. We have done the hard work for you 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.



Award Emblem: Top 9 Best Financial Advisors in Iowa (Des Moines, Ames, Dubuque, and Davenport)

AdvisoryHQ's List of the Top 9 Best Financial Advisors in Iowa

List is sorted alphabetically (click any of the names below to go directly to the detailed review section for that advisor)

- [Chartered Financial Services](#)
- [Compass Financial Services](#)
- [Foster Group](#)
- [HJN Advisors](#)
- [Marrs Wealth Management, LLC](#)
- [Quad Cities Investment Group](#)
- [Steele Capital Management](#)
- [Syverson, Strege & Company](#)
- [West Financial Advisors](#)

Top 9 Financial Advisors in Des Moines, Ames, Dubuque, and Davenport, Iowa | Brief Comparison

Financial Advisors in Iowa	Highlighted Features
Chartered Financial Service, Ltd.	Services for Business & Plan Sponsors
Compass Financial Services	Life Cycle Planning
Foster Group	Institutional Approach
HJN Advisor	Family Governance
Marrs Wealth Management, LLC	In-depth investment approach
Quad Cities Investment Group	Comprehensive Planning Process
Steele Capital Management	Family Roadmap
Syverson Strege & Company	Fee-only firm
West Financial Advisors	Comprehensive Financial Calculators

Table: Top 9 Best Financial Advisors in Iowa | Above list is sorted alphabetically

AdvisoryHQ's Selection Methodology

What methodology does AdvisoryHQ use in selecting and finalizing the credit cards, financial products, firms, services and products that are ranked on its various top rated lists?

Please click here “[AdvisoryHQ's Ranking Methodologies](#)” for a detailed review of AdvisoryHQ’s selection methodologies for ranking top rated credit cards, financial accounts, firms, products, and services.

Detailed Review – Top Ranking Best Wealth Management Firms in Iowa

Below, please find the detailed review of each firm on our list of best wealth management firms in Iowa. We have highlighted some of the factors that allowed these financial advisors in Iowa to score so high in our selection ranking.

See Also: [Best Financial Advisors in D.C., Maryland, & Virginia \(Tri-State\) | Ranking | D.C., MD & VA Wealth Managers](#)

Chartered Financial Services, LTD Review

Founded in 1982, [Chartered Financial Services, LTD](#) has been providing wealth management services for its clients 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.

Chartered Financial Services is a fee-based wealth management firm in Iowa. Nevertheless, we have included this Des Moines financial advisory firm on the list for the range of services that it offers.



Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Iowa

Below you will find key factors that enabled Chartered Financial Services, LTD to rank as one of the top financial advisors in 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).

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 financial advisors in Des Moines 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

Business and plan sponsors take on a large responsibility when trying to fulfill 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 from this top wealth management firm in Iowa [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, this wealth management firm in Iowa has partnered with [two different organizations](#) to bring you the highest level of service.

- 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.
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Compass Financial Services Review

There's no other way to put it: [Compass Financial Services](#) just has a positive vibe.

The way they describe their approach to wealth management suggests they are a financial advisory firm in Iowa that really enjoys what they do. When they started in 1997, their goal was to "[help people match their dollars with their dreams](#)". Since then they have grown in size, but they have stayed true to their initial purpose.

The firm says it takes a fee-based approach, however, their description suggests they mean fee-only. They [write](#):

"Our fee-based approach is independent and objective. Our hourly fees are not connected with the sale of a product and provide you with a perspective that could prove vital to your financial plan."

We have included this wealth management firm in Iowa on this list based on this description and the services they offer. But we recommend that you confirm their fee structure when soliciting their services.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Iowa

Below you will find key factors that enabled Compass Financial Services to rank as one of the top financial advisors in Iowa.

Clear Vision and Inspiring Philosophy

This team of financial planners in Des Moines considers their firm to be a safe space for people who wish to gain control of their finances. They outline their vision quite simply and clearly.

Our Passion: Value of person

Our Priority: Listening

Our Economics: Be Profitable But Not Profit Driven



Education Based Financial Planning

Hiring a financial advisor in Iowa, or anywhere else, can be a disorienting experience. On the one hand, you are paying a professional to give you their expert opinion and essentially tell you what to do. On the other hand, you do not want to be kept completely out of the loop about what is happening with your money or patronized.

Compass is a wealth management firm in Iowa that provides an education-based approach to financial planning. Instead of presenting its recommendations and then trying to convince clients of why it's the best approach, their financial advisors prioritize listening and educating their clients about the varying options.

The final decision winds up being something both parties are happy with, as opposed to something the client has been pushed into.

With this approach, the client is being educated instead of directed.

These financial planners in Iowa can help you conduct financial planning that [includes](#):

- Net worth analysis
- Estate planning
- Education planning
- Cash flow management techniques
- Retirement income planning

- Insurance and risk analysis
- Investment evaluation and strategy

Financial Check-Up and Second Opinion

Sometimes, you don't need a new financial advisor in Iowa. Sometimes, you just need a second opinion. If you are looking for an objective analysis of your current financial situation, Compass offers what they call a "financial check-up".

Clients of other firms can receive a no-obligation second opinion without worrying that Compass is just trying to snatch them away from their existing wealth management firm.

This way you can identify any potential red flags or receive the kind of third party confirmation that'll give you peace of mind.

Retirement Planning

Transitioning from life as an employee to life as a retiree is challenging in a number of ways: physically, emotionally, mentally. Proper planning can ensure that everything is smooth sailing financially.

Even if you have already thought about retirement, and have actively saved your money in anticipation, there are many factors that may not have crossed your mind. Some things a wealth management firm in Iowa like Compass can help you with [include](#):

- Shifting your assets from growth mode to income mode
- Assessing and preparing for the possibility of health issues and long term care in retirement
- Hypotheticals of the amount of retirement income you'll need (upwards of 30 years in some cases)
- A conversation about the retirement lifestyle you desire and the required net worth

Life Cycle Planning

Money may not buy you happiness, but it certainly helps, and it can be a deciding factor for how successful certain life changes are.

Compass is a wealth management firm in Iowa that helps people think about the financial implications of different life changes. Many of these life events

deal with questions of debt, credit, and savings in addition to future wealth. Life cycles highlighted by this Des Moines financial advisory firm [include](#):

- Getting married
- Family stages (i.e. raising kids, college tuition)
- Divorce
- Retirement
- Death

Don't Miss: [Best Financial Advisors in Oklahoma City & Tulsa, OK | Ranking | Oklahoma City & Tulsa Wealth Managers](#)

Foster Group, Inc. Review

[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. 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 Wealth Management Firm in Iowa

Below you will find key factors that enabled Foster Group, Inc. to rank as one of the top financial advisors in Iowa.

Guiding Principles

What makes the team of Iowa financial advisors 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 of financial planners in Iowa 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 front line advisory staff in 25 years!](#) That’s unheard of. It is a further testament to the unique culture cultivated 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. [Almost 40%](#) of their clients are medical professionals. 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 by their financial advisor in Iowa. 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, this team of financial planners in Iowa 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. This wealth management firm in Iowa is well equipped to meet the unique and complicated needs of institutional clients.

HJN Advisors, LLP Review

Opening their doors in 2007 in the heart of downtown Des Moines, Iowa, [HJN Advisors](#) comes armed with a collective [150+ years](#) of financial experience. This wealth management firm in Iowa offers 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 Wealth Management Firm in Iowa

Below you will find key factors that enabled HJN Advisors to rank as one of the top financial advisors in Iowa.

This firm does not explicitly state whether they are fee-only or fee-based. If you choose to explore working with this firm, make sure to confirm their compensation structure before acquiring their services.

An Experienced Team

With over 150 years of financial experience, you can feel the prestige that stands with the team of top Iowa financial advisors 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 seems to think so.

These financial advisors in Iowa have 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 them 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 Iowa wealth management firm brings just that to the table. They offer everything from U.S. corporate bonds to equities and private placements.

[Related: Best Financial Advisors in Minneapolis, MN | Ranking | Minneapolis, Edina Area Wealth Managers](#)

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 to accomplish a common goal: securing your financial future and growing your assets in the process.

Marrs is a [fee-only](#) wealth management firm in Iowa.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Iowa

Below you will find key factors that enabled Marrs Wealth Management to rank as one of the top financial advisors in 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 Marrs Wealth team, but rather the whole organization. These financial advisors in Iowa 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 researchers, Marrs Wealth is determined to maximize your risk-adjusted returns.

Investing with this top wealth management firm in Iowa allows you access to the best 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. Marrs 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.
 - Puts You First: The fee-only model applied by Marrs Wealth guarantees that you always come first and that 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.

Quad Cities does not indicate on their site whether they are a fee-only or fee-based wealth management firm in Iowa. We recommend confirming their compensation structure before acquiring their services.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Iowa

Below you will find key factors that enabled Quad Cities Investment Group, LLC to rank as one of the top financial advisors in Iowa.

Knowledge Center

Being informed about what is happening in your financial world is crucial. 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 through their [Knowledge Center](#). It can really help you understand your finances and the markets directly associated with them.

The Planning Process

Life is ever-changing. With good planning, 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 the [comprehensive system](#) used by this team of financial advisors in Iowa:

- **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 in Iowa 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

You can expect the following individualized services when working with this team of financial advisors in Iowa.

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

Popular Article: [Best Financial Advisors in Indianapolis, IN | Ranking | Indianapolis Wealth Managers](#)

Steele Capital Management, Inc. Review

Although [Steele 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. This team of Iowa financial advisors also serve individuals and company-sponsored retirement plans all over the country.

Steele Capital is a [fee-only](#) wealth management firm in Iowa.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Iowa

Below you will find key factors that enabled Steele Capital Management to rank as one of the top financial advisors in Iowa.

The Drive for Independence

It should come as no surprise that an Iowa wealth management firm 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 specific products.

Free Portfolio Review

A few good financial advisory firms in Iowa will offer a free "second opinion" or review of your current financial portfolio. Steele Capital is no exception. They would be happy to analyze your current investment portfolio and provide you with a free written report.

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 in Iowa 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 with your financial advisors in Iowa, you can be leaving up to \$100,000 sitting on the table! There are many questions to ask and considerations to be made. 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 on is never an easy one. However, you can ensure that this time is made less challenging for your loved ones by settling your affairs in advance. Even if you've put this off for too long, the financial advisors at Steel Capital are 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. This top wealth management firm in Iowa offers security, convenience, and personalized service as they help you.

What is included in such a plan?

- 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 Wealth Management Firm in Iowa

Below you will find key factors that enabled Syverson Strege to rank as one of the top financial advisors in 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)

Your Financial Plan

Since they first opened in 1997, the Iowa financial advisors at 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 Iowa financial advisors 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.

Related: [Best Financial Advisors in Pittsburgh, PA | Ranking | Pittsburgh Wealth Management Firms](#)

West Financial Advisors Review

[West Financial Advisors](#) was started by a powerhouse duo, Laura and Brian West in 2006. They took their extensive business and accounting experience and created a fee-only wealth management firm in Iowa. Laura is a Certified Financial Planner™ who handles the planning portion while Brian handles the portfolio design and management as the team's Chartered Financial Analyst^(R).

This wealth management firm in Iowa serves people from all walks of life including professionals, executives, State of Iowa employees, retirees, and pre-retirees. They work especially well with women and couples who are looking to gain control of their financial futures.

Key Factors That Enabled This Firm to Rank as a Top Wealth Management Firm in Iowa

Below you will find key factors that enabled Steele Capital Management to rank as one of the top financial advisors in Iowa.

Personal Wealth Management

West Financial Advisors recognize that with success comes complexity. In other words: more money, more problems.

Fortunately, working with an Iowa wealth management firm in Iowa can reduce the probability of any problems occurring. They can ensure your retirement savings is growing through strategic investments, you aren't paying more than your fair share of taxes, and that your family is set if anything should happen to you.

The [wealth management services](#) provided by this Iowa financial advisory firm include:

- Portfolio design and management
- Asset allocation and portfolio rebalancing
- Retirement planning
- Risk management
- Tax strategies
- College planning
- Estate planning and trust management
- Charitable planning
- Long-term care and other insurance planning

Employer Retirement Plans

Both Laura and Brian have business backgrounds. Brian was even chief operating officer and chief financial officer at global manufacturing company in Des Moines. As a result, they know what it means to attract and retain good employees and key executives with attractive employer retirement plans.

These financial advisors in Iowa can help you design and administer employer-sponsored retirement plans for small-and medium-sized businesses. During their time as accountants, both Laura and Brian have worked with public and private businesses.

This wealth management firm in Iowa offers the [following kind of support](#) when it comes to employer-sponsored retirement plans:

- Assistance meeting your fiduciary responsibilities
- Selecting and monitoring investments
- Educating employees about investing
- Understanding and managing hidden fees
- Implementing effective tax reduction strategies

Comprehensive Resources & Financial Calculators

The top wealth management firms in Iowa (or anyplace for that matter) care about educating their clients. They do not want them to be ignorant to what is happening with their money, and actively provide resources to help them get the 411.

West Financial Advisors offers a resources page for their clients that includes a [market data bank](#), [stock quotes](#), [numerous web-based resources](#), and numerous [financial calculators](#). The calculators alone could keep a client busy for hours. There is everything from an accelerated debt payoff calculator to a life expectancy calculator.

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.

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.

Read More: [Best Financial Advisors in Atlanta, GA | Ranking | Atlanta Area Wealth Managers](#)

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- <http://compassiowa.com/why-compass-financial/>
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