



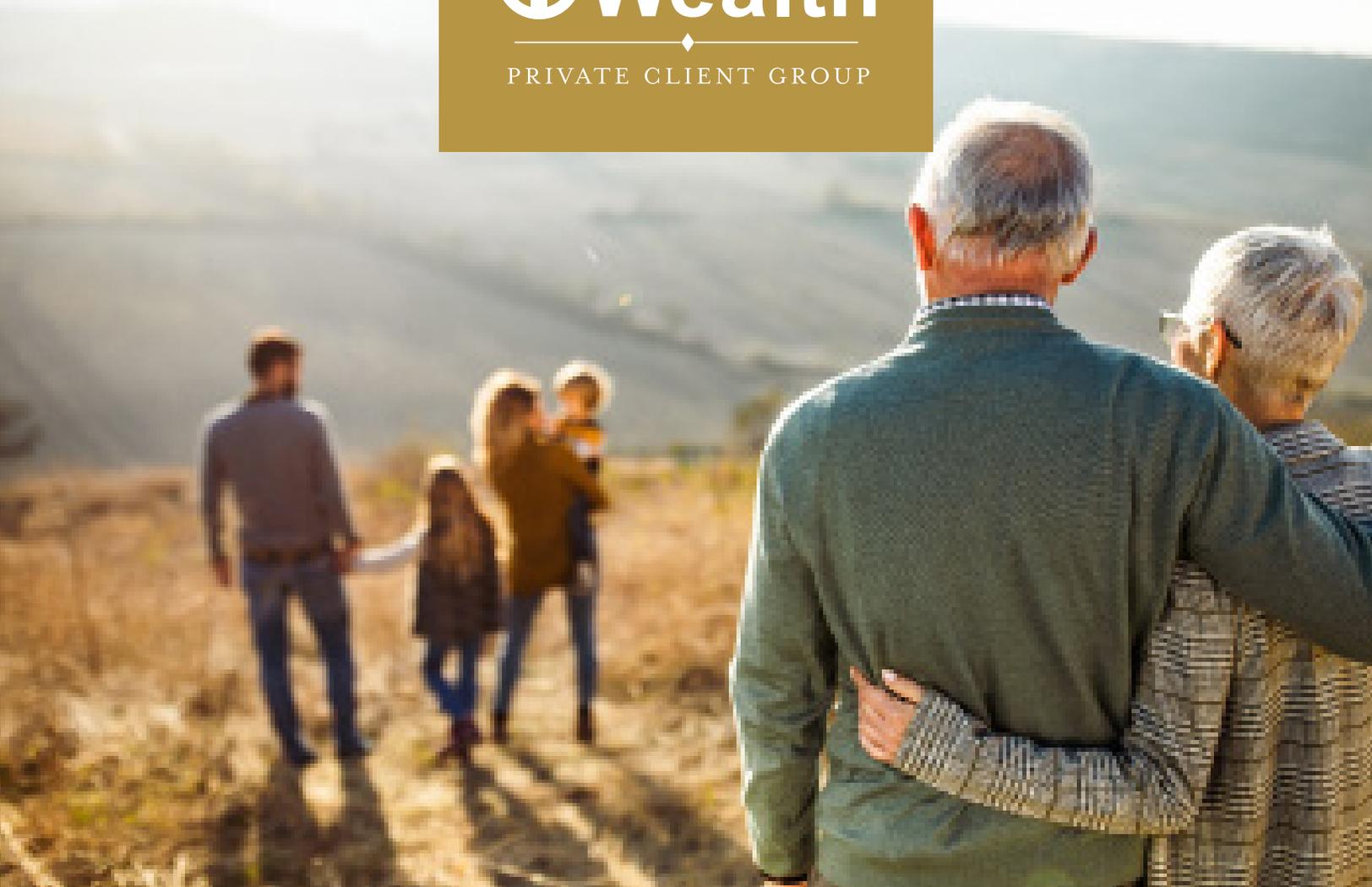
The Plan On Purpose Office

A coordinated service
for affluent families and
business owners with
\$10M+ in assets.



iWealth

PRIVATE CLIENT GROUP



A Network Built Around You

Through the iWealth Private Client Group, you gain access to a carefully selected network of specialists. This isn't a directory—it's a living, breathing team we trust to serve our most important relationships: our clients.

We act as your financial quarterback, integrating these professionals into your plan to reduce complexity and deliver clarity—so you can focus on what matters most.

Who It's For

The Family Guided Office is designed exclusively for affluent families and business owners with \$10 million or more in assets who want to simplify their lives, align their professionals, and create lasting clarity across generations.

Fees Tailored to Your Unique Needs

Every family and business we serve brings a unique story, structure, and level of complexity. Because of that, we don't believe in one-size-fits-all pricing.

Our fees are thoughtfully structured based on the scope of your situation and the services required to support your goals.

This approach ensures your fee reflects:

- The complexity of your financial landscape
- The breadth of professionals involved in your coordinated plan
- The level of ongoing guidance and oversight your family or business requires
- Any specialized planning, legacy work, or strategic support unique to your circumstances

Our goal is simple: to provide transparent, fair pricing aligned with the value of a fully coordinated advisory team working on your behalf.

We welcome a conversation to explore your needs and outline a fee structure that supports your vision moving forward.

Your First Complimentary Meeting

A conversation designed entirely around you.

We believe every great partnership begins with a genuine, pressure-free conversation. As a reader of this brochure, you're invited to a **First Complimentary Meeting** with our Private Client Group—an opportunity to explore whether the **Family Guided Office** is the right fit for your family, your business, and your long-term vision.

What This Meeting Offers

- A confidential, no-obligation conversation focused on your goals, concerns, and priorities
- A high-level review of your current financial landscape, including the professionals already in your world
- Clarity on how our coordinated network—from legal and tax specialists to legacy and lifestyle resources—could support you
- A guided overview of potential next steps, should you choose to move forward

This meeting is simply an opportunity to connect, ask thoughtful questions, and experience the value of a fully aligned advisory team.

Whether you're seeking greater simplicity, better coordination, or a long-term partner to support your family's legacy, we're here to help you explore what's possible.

What You'll Have Access To

Through the Family Guided Office, you'll gain coordinated access to a carefully curated network of professionals – integrated seamlessly into your financial plan by your iWealth team.



Business & Legal

- Corporate Retirement Plan Strategies
- Legal Specialists
- Lending & Credit Resources
- Intellectual Property Guidance



Risk & Protection

- Insurance & Risk Mitigation
- Group Benefits
- Tax Planning Professionals



Family Legacy & Estate

- Trust & Estate Attorneys
- Trust Administration Services
- International Planning Resources



Lifestyle & Strategy

- Business & Life Coaching
- Health & Medical Specialist Referrals
- Private & Family Travel Coordination
- Investment Management Team Access

Your dream, Your team

We're here to guide you – every step of the way.



BRAD CONNORS, CWS[®], CEPA[®]
CHIEF EXECUTIVE OFFICER



SHAWN POMEROY, CPFA[®]
VICE PRESIDENT



JP EYKYN, CRPC[™]
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