

Our Investment Process: Step by Step

Why Do We Have A Process?

One of the leading reasons individuals lose fortunes in the market is because they were chasing returns versus following a

detailed plan. We would like to work with folks over the long run. To ensure a great relationship, we are focused on starting on the right foot.

We are never in a hurry to scramble clients into getting into the market. We want to make sure our clients are always properly invested to their comfort.



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Step One: Goal Discovery

Your money, your life, and your goals. We realize that each individual/family is uniquely different from the next one. It is important to understand the 'why' behind your motivation with your assets.

Some examples: buying that vacation home, funding children's college education, retiring by a certain age.

This is how we understand your expectations for us.



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Step Two: Risk Assessment

You fill out a risk survey to gauge your thoughts and concerns about the market.

Before we can give a proper recommendation regarding your financial plan or asset allocation, we need to see where you stand from a risk standpoint.

This is key for an apples-to-apples comparison. Many people's portfolios are not situated to their risk comfort level.



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Step Three: Recommendation Review

We will provide a comprehensive risk analysis of your current portfolio and present a side-by-side analysis of our options.

This is the apples-to-apples comparison to make sure you are properly invested to your risk comfort level, and to see if IAMS Wealth Management can provide additional value that you are not already receiving.



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Step Four: Implementation

If you agree to move forward as a client, we will proceed with opening account(s) and getting assets transferred over.

We will execute trades and quality checks according to your proposal in step three to make sure your account(s) were properly implemented.



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Step Five: On-Going Review

We will focus on making sure your portfolio is properly invested according to your risk tolerance and goals.

We will chat at least quarterly to review your investments.

We prefer routinely making small adjustments after our quarterly check-ins over making large adjustments once a year like other advisors.