SYVERSON STREGE

FINANCIAL PLANNING | INVESTMENT MANAGEMENT

We exist to enrich and empower your life.

Your life goals are our biggest priority. We serve you with sound financial education and advice.

- Clarity and understanding.
- Peace of mind.
- Simplicity.

SYVERSON STREGE

Syverson Strege offers you:

- Fee-only financial planning (no commissions)
- Investment management
- Experienced, credentialed financial planners and associate financial planners
- Philanthropic planning

You will experience peace of mind, clarity, understanding, and a simple approach to comprehensive planning.

Values-Based Financial Planning

Your Lifeprint…your values, your purpose, and the “why” of your legacy.

We take the time to listen, ask questions, and learn what is most important to you.

We care about your money, property, and financial success, but we also care about a bigger view that embraces your values and ultimate purpose in life.

A custom financial plan from Syverson Strege will help you achieve clarity, peace of mind, and harmony between your financial goals and your life purpose. **We only work for you.**

We Are A Fiduciary

You can trust our team to provide trustworthy financial advice for all of your financial situations.

We abide by a fiduciary oath signifying we will always act in your best interest.

Our “duty to care” means that we will continually monitor your financial situation for the duration of our relationship.

Syverson Strege works as a fiduciary and our only compensation is paid by you, not third parties such as banks or brokerage firms. We do not sell life insurance, annuities, or any other products. Instead, we provide fee-only services grounded upon our loyalty to you.

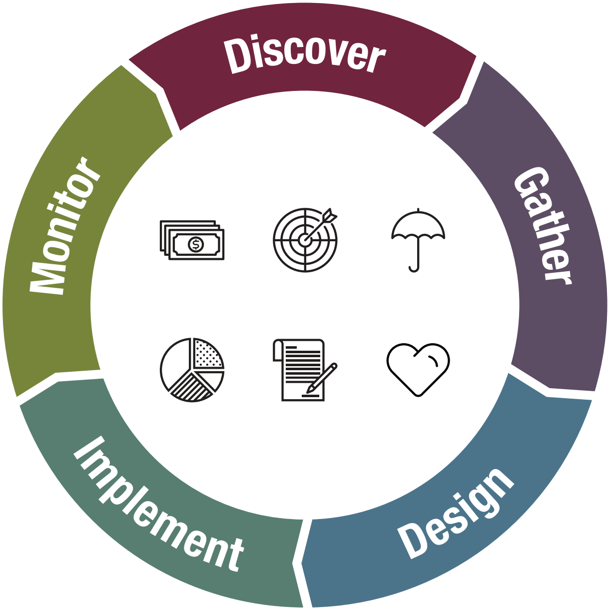

TRUST
CLARITY
INTEGRITY
COMPASSION
STEWARDSHIP
PEACE OF MIND
REALIZED GOALS
COORDINATED GAME PLAN
ROCK SOLID ADVICE
UNDERSTANDING
ACTION PLAN
SIMPLICITY
DILIGENCE
TRUTH
JOY

Fee-Only Financial Planning

You pay only a planning fee…no other hidden fees, commissions, or product sales.

Syverson Strege has a fiduciary responsibility to do only what is right for you.

Fee-only planning provides a comprehensive, coordinated game plan for your financial and life goals.



Cash Flow & Tax Planning

Understanding your family's cash flow is vital to the success of any financial plan.

Retirement Planning

Retirement planning helps you set up a structure to provide for your financial needs after retirement.

Risk Management

Protecting your wealth is equally as important as accumulating your wealth.

Investment Planning

Our custom approach to your investments is about you, your goals, and meeting your specific needs.

Estate Planning

Estate planning is the process of ensuring your wishes (financial or medical) are carried out and that your money and values are passed on efficiently to the next generation.

Philanthropic Planning

Using tax-efficient, charitable tools will help make a major impact with your philanthropic gifts.

Investing For You

Syverson Strege Investment Management is dedicated to reviewing, understanding, and developing an investment strategy that fits your needs.

Our Investment Committee, comprised of certified investment specialists, meets regularly to monitor the financial markets on your behalf and help you achieve your desired financial success.

We are an independent investment advisor, not affiliated with banks, insurance companies, or brokerage firms. We are not obligated to sell their products. We search the marketplace to find the right investment structure for you.

Successful Investment Strategies

- Research
- Educated Counsel
- Stability
- Tax Efficiency
- Clarity

Magnify Your Living and Your Giving

Create a lasting Lifeprint that will magnify your living and your giving.

Our clients show extraordinary generosity to their families and charities they support!

Our knowledge and recognized leadership in the complex world of philanthropic giving can transform your dollars into action that will benefit generations to come.

Through charitable planning, Syverson Strege can help you:

- Increase your lifetime income
- Avoid taxes and limit the amount going to the government
- Leave a lasting impact to benefit your favorite charities

A Message From Our Founders

Our commitment to you is to honor your values, your purpose, and the “why” of your legacy through sound financial planning.

We first worked together as financial planners at another firm in 1989. We had similar faith backgrounds, core values, and work ethics. We believed (and still do believe) in servant leadership and integrity.

We both felt like we were in a sales culture rather than an advisory culture. So in 1997, we founded Syverson Strege to focus on a culture of education and understanding, not selling. Our goal was to understand our clients to create comprehensive, understandable financial plans on a fee-only basis (no commissions or product sales).

We are blessed to have a team of skilled, credentialed financial planners and associate financial planners whose knowledge is highly regarded by their peers. With a robust client retention rate, the team is client focused and thought leaders in the industry.

We love working with people who share our passion for charitable giving! Our proficiency in philanthropic planning can help magnify your living and your giving to benefit generations to come.

It’s rewarding to hear the “aha” moments when we share a financial strategy that works. It’s as if clients wonder why no one else made the same suggestion. Clients come to see that their financial goals become a reality.

Your life goals are our biggest priority! Our promise to you is compassionate, responsible stewardship of your resources.

We only work for you,

Take the Next Steps

- **Call (515) 225-6000** for a free initial consultation with one of our credentialed financial planners
- **Visit OnlyWorkForYou.com** to learn more
- **Follow us** on **Facebook**, **Twitter**, and **LinkedIn**
- **Sign up for our newsletter at OnlyWorkForYou.com**
- **Email us at: info@OnlyWorkForYou.com** with any questions

What You Can Expect

If you take the next step to meet with one of our planners, you will go through a two-step meeting process free of charge and with complete confidentiality. The process focuses on YOU as part of our team!

Opportunity Meeting

1. Free consultation one hour in length
2. Information gathered about your financial situation
3. Interactive conversation to listen, ask questions, and learn what is most important to you

Proposal Meeting

1. Scheduled 1-2 weeks after the Opportunity Meeting
2. Custom overview of your opportunities and outcomes
3. Tailored presentation of plan deliverables and fee schedule
4. Opportunity to become a client

SYVERSON STREGE

4125 Westown Pkwy #104 | West Des Moines, IA 50266
(515) 225-6000 | OnlyWorkForYou.com