PWM Referral Process

One way we provide value is by creating a simple process for you to introduce our services and solutions to the people that you care about. We understand that referring an advisor requires a significant level of trust. At PWM Private Wealth Counsel, iA Private Wealth we work every day to earn that trust. You can be confident that those you care about will receive the level of service and professionalism that you have become accustomed to.

Below are situations where we are able to provide significant value:

- Entering Retirement & Income Planning in Retirement.
- Evaluating Pension Options.
- High Taxable Income Situation.
- Selling Farm or Business.
- Transferring a Farm or Business to a Child & Equalizing Nonparticipating Children.
- A Spouse Passes Away.
- Planning for a Child's Education.
- Making the most of a Severance Payment.
- Investing with lower risk and volatility.
- Transferring Wealth to the Next Generation.

We enjoy working with the adult children of our clients. You can never start investing too early and we pride ourselves on taking the time to get to know your children and educate them about investing in order to put them on the path to reaching their financial goals.

How can you make an introduction?

- Complete our Discovery Meeting Request form that either of you can submit to us. This will put the introduction in motion.
- They will get an email or call back, depending on their preference, and from there can schedule a time to meet with one of our advisors and/or get any questions answered.
- We will send them an "Introductory Kit" either via mail or email, which will help them determine if we may be a fit for their needs.

Alternatively,

- Have them call our office at 306-975-9500 or 800-652-7472 and ask for information about our services or to schedule an introductory meeting with one of our advisors.
- Email us at info@pwmprivatewealth.com.

We often get asked if we are taking on new client relationships. The answer is a qualified yes! We say, "qualified," because, although we are well poised for growth, we are interested in growing at a reasonable pace without compromising the trust and confidence you have placed in us. We value and understand those seeking a long-termrelationship with an experienced professional team. We will always work in your best interest. A referral from you and your continued business are the highest compliments we could ever receive.

Again, we thank you for your trust and confidence.

iA Private Wealth™

PWM PRIVATE WEALTH COUNSEL