

The background of the entire page is a financial chart with various lines and data points. A hand is holding a magnifying glass over the chart, focusing on the title. The title is in large, white, serif capital letters. Below the title, the text 'special advertising section' is written in a smaller, white, sans-serif font. In the bottom right corner, the names of four financial institutions are listed in white, serif capital letters.

LEADERS IN WEALTH MANAGEMENT

special advertising section

CAPTRUST
BANKERS TRUST
GENERATIONS WEALTH MANAGEMENT
IOWA STATE BANK



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*Vice President
Financial Advisor*



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DES MOINES TEAM TO THEIR 2019
TOP 50 INSTITUTIONAL CONSULTANTS LIST!**



CAPTRUST

CAPTRUST specializes in providing investment advisory services to retirement plan fiduciaries, endowments, and foundations, and comprehensive wealth planning services to executives and high-net-worth individuals. Our firm was built on the premise that investors are best served by advisors who are motivated to focus exclusively on the best interests of their clients.

Retirement Advisory Services

- Investment advisory services
- Fiduciary investment management
- Provider search and selection
- Provider fee benchmarking
- Participant advice

Private Wealth Services

- Financial and estate planning
- Retirement and education funding
- Investment consulting services
- Portfolio performance analysis
- Cashless stock option exercise

Endowments & Foundations

- Fiduciary advisory management
- Investment advisory services
- Spending policy evaluation
- Environmental, social, and governance (ESG) investing
- Board member training

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Top (from left): Nate Birkholz, JD; Ashlee Vieregger, JD, CFP®, CTFA; Brian Blankenburg, CWS®
Bottom (from left): Tracy Abbas; Mindy Nussbaum-Bell

**THE DIFFERENCE BETWEEN
HOPING AND TRUSTING**



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The Bankers Trust Private Client Services team provides comprehensive financial planning, investment management and fiduciary services. What's more important is that we are committed to building a strong, long-lasting relationship with you. That commitment comes from knowing we pro-

vide the best solutions when we fully understand your needs, aspirations and concerns. Whether for financial planning, investment management or trusts, we put your best interest first, earning your trust and confidence with each interaction.

We also offer wealth management solutions for businesses and institutions including retirement plan services and institutional custody. We have the flexibility, size and experience to be your one-stop provider. Our professionals will help you meet your business's goals, providing customiza-

tion and the highest level of service and attention. Learn more about our wealth management services for individuals, businesses and institutions at [BankersTrust.com/wealth-management](https://www.bankersttrust.com/wealth-management), or contact us for more information.



From left: Michelle R. Mahoney, CFP® and Julie Fuller, CPA, CFP®

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With decades of experience and complementary backgrounds, Michelle Mahoney and Julie Fuller co-founded Generations Wealth Management in 2009 to provide a broad spectrum of financial services to their clients. Their expertise encompasses investing, tax planning, intra-generational wealth management, family office services, chari-

table giving, debt structuring, estate planning, insurance and more.

It's this unique combination of tax, finance and wealth management expertise that sets Generations Wealth Management apart—making us a powerful and efficient resource for our clients.

Independent advisor

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(Back row, left to right) Matt M. Spading, Vice President & Trust Officer. Philip A. Horn, Vice President & Trust Officer. Maureen A. Shanabarger, J.D., Vice President & Trust Officer. Larry R. Cobb, Executive Vice President & Senior Trust Officer. Alan E. Gross, President & CEO. Ann M. Hanson, Vice President & Private Banking Officer. Jeffrey C. Wisecup, C.T.F.A., Vice President & Trust Officer. Allan L. Knudsen, J.D., Vice President & Trust Officer. Darcy K. Culver, Vice President & Trust Officer. Max D. Miller, C.P.A., Vice President & Trust Officer. (Front row, left to right) Jason K. Clevenger, CFA, Vice President & Trust Investment Manager. Billi M. Brahn, J.D., Senior Vice President & Trust Administration Manager. Steven C. Hoeksema, J.D., Executive Vice President & Director of Wealth Management. Lauren L. Burgeson, Executive Vice President.

TRUST

“A firm belief or confidence in the honesty, integrity, reliability of another person or thing”

—Webster's New World Dictionary

For many years, Iowa State Bank has been well known for our strong Trust and Wealth Management department. Planning for the future of your family or business is a critical and necessary step, and our experienced team is ready to help.

Everyone at Iowa State Bank is committed to helping our customers successfully achieve their financial goals. Our Trust and Wealth Management department is proudly based in Central Iowa and always will be. We feel that our local presence is essential to provide the personal attention and service that our customers deserve. Decisions are made locally and with flexibility, taking into account the individual situations of our customers.



Iowa State Bank

Trust and Wealth Management

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