



MOVEMENT WEALTH PARTNERS

DESTINATION BY DESIGN





MEET THE MOVEMENT WEALTH PARTNERS TEAM

Movement Wealth Partners CEO Scott Adams has brought together a team of specialists to ensure his clients receive personalized, professional and friendly financial planning advice and service.

SCOTT ADAMS

FOUNDER & CEO



As the Founder and CEO at Movement Wealth Partners, I am dedicated to helping our clients pursue and manage financial independence through personalized planning. My role involves developing comprehensive financial strategies tailored to your unique goals, regularly reviewing your financial situation, and providing professional investment advice. I manage a team ensuring that you receive the highest level of service and professionalism. With extensive experience, a deep commitment to your financial well-being, and a focus on clear communication, I strive to guide you through every phase of your financial journey.

LOGAN PALMITIER

CLIENT RELATIONSHIP MANAGER



Logan Palmitier is the Client Relationship Manager at Movement Wealth Partners. Logan is an Iowa native and currently resides in Ankeny. Prior to joining Movement Wealth Partners, he lived in Iowa City, Iowa Falls, and Owatonna, Minnesota. In his free time he enjoys spending time with family and friends, golfing, fishing, and cheering on the Iowa Hawkeyes and Denver Broncos. He is also actively involved in Shriner's Hospital for Kids and enjoys seeing the thankful smiles on the families and kids they help serve.

NICKI WHITE

CLIENT CARE COORDINATOR



A life-long Iowa resident, Nicki lives in Osceola with her fiancé Aaron and 4 dogs (3 Chocolate Labs and an English Pointer). She has 3 adult children and one incredible grandson. In her spare time, Nicki enjoys home improvement projects, cooking/baking, hunting/fishing, dog training, traveling, and attending Iowa State games.

YOUR *DEPENDABLE* PARTNER IN FINANCIAL SERVICES FOR

15 Years

ABOUT SCOTT ADAMS

Scott and his wife, Danielle, reside in Ankeny with their two children, Madelyn and Will, who are both attending the University of Iowa. Outside of his professional life, Scott is passionate about spending quality time with family and friends, and he enjoys being outdoors, golfing, hunting, fishing, and traveling. His number one goal is to help people make informed decisions about their money. With the heart of a teacher, Scott excels at guiding clients to set realistic financial goals and coaching them through every phase of retirement. Having been a Financial Advisor since 2010, Scott began his career in the financial services industry in 1999. His dedication to the community is evident through his active involvement with Shriners Children's Hospitals, where he strives to make a difference for those in need. Scott is a member of both the Financial Services Institute and the Society of Financial Service Professionals as well as the Des Moines Reciprocity Club. He holds a Bachelor of Arts degree from William Penn University and has earned the Accredited Wealth



Management Advisor (AWMA[®]) designation from the College for Financial Planning[®]. Scott is licensed to offer a range of financial services, holding Series 7 and 66 securities licenses through LPL Financial, and providing investment advisory services and securities across multiple states. Additionally, he is licensed in life, accident, and health insurance, as well as variable life insurance, offering these products and services in several states. Scott's commitment to his clients and his community, combined with his extensive knowledge and experience, make him a valued advisor and an impactful speaker in the financial services industry.



OUR MISSION

At Movement Wealth Partners, we are committed to helping our clients by building an intentional and individualized financial plan and asset management experience that aligns with your core values. We believe in understanding your specific goals and dreams to provide the framework for an educated and confident financial decision. Our ongoing asset management and financial planning process provides you with what matters most when life happens, and things change.

AUTHENTIC ► We understand there are many options when selecting and working with a Financial Advisor. We strive to be authentic in our approach, working with you and tailoring our suggestions to appropriately align with your core values.

EDUCATE ► We believe in having the heart of a teacher. Our ongoing coaching will provide you the tools to make the appropriate financial decisions that best fit your needs

CLIENT EXPERIENCE ► We know that over time, financial circumstances, and dreams can change. We offer an intentional and individualized experience focused on your goals and dreams.

PARTNERSHIP ► Working alongside our clients, our ongoing partnership is a bilateral process. We want to work with you to achieve what is most important. We want to give you the confidence knowing that you have a team to support you and your family for years to come. Dream big!

OUR PROCESS

Movement Wealth Partners is an established wealth services firm tailored for a broad spectrum of clients, including many entrepreneurs and former business owners with unique aspirations and needs. Our founder, Scott Adams, believes strongly in the foundational role of the financial planning process to pursue financial goals.

At Movement Wealth Partners, we engage with each client to understand their current financial status, define their future ambitions, and develop a comprehensive plan that supports their financial journey, pursuing their financial objectives.

DISCOVERY

IDENTIFY YOUR GOALS ►

What achievements are you striving for?

CLARIFY YOUR VALUES ►

What matters most to you in your financial landscape?

DESIGN

CRAFTING YOUR PATH ►

How will we navigate your financial journey?

CUSTOMIZING SOLUTIONS ►

Which of our services align best with your specific needs?

DEPLOYMENT

COMPREHENSIVE FINANCIAL & LEGACY PLANNING ►

Structuring your financial future and lasting legacy.

THOROUGH PRODUCT & RISK EVALUATION ►

Ensuring each financial instrument fits your risk profile and investment goals.

CONTINUOUS, ADAPTIVE SERVICE ►

Responding to changes in your life and in the market with ongoing support.

CULTIVATING ENDURING RELATIONSHIPS ►

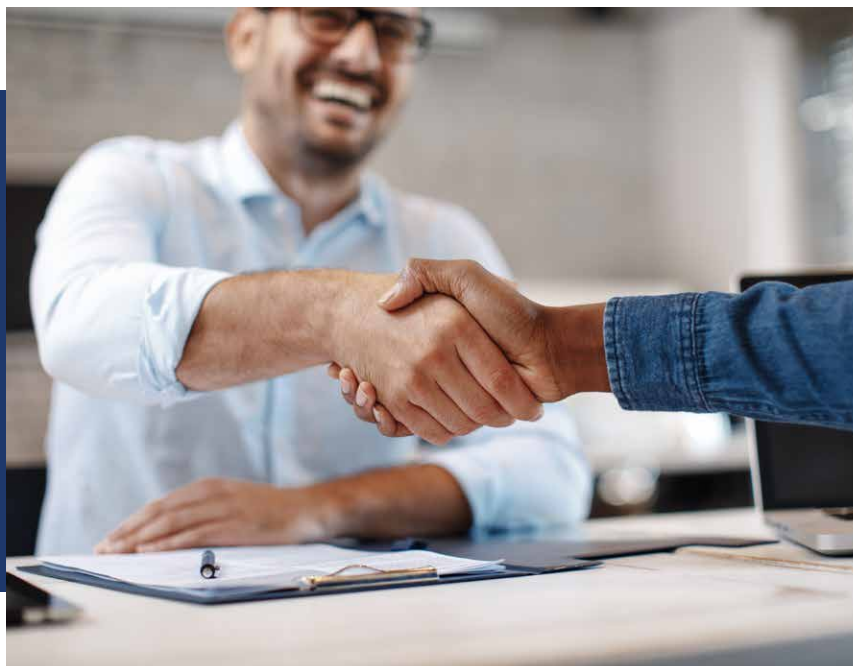
Building a strong, lasting connection that supports your evolving financial needs.



OUR PARTNERSHIP WITH YOU



We provide comprehensive financial planning in the context of a long-term partnership with you. Through our experience we have learned it is important that everyone is clear on what to expect if we are to develop and maintain a successful working relationship –one where I can help you manage your financial and lifestyle goals.



KEYS TO A SUCCESSFUL RELATIONSHIP

WHAT YOU CAN EXPECT

You can expect that I will consistently and responsibly perform all services related to the provision, review and ongoing monitoring of the financial planning solutions we implement on your behalf.

WE WILL ALWAYS

- ▶ Strive to acquire and maintain a thorough understanding of your financial goals
- ▶ Update your current financial information on a regular basis
- ▶ Carefully assess and monitor your investment risk and time-frame
- ▶ Explain the implications of all recommended financial planning strategies and gladly answer any questions you may have
- ▶ Update you as and when appropriate by email, mail and phone
- ▶ Meet with you regularly to review your Personal Financial Organizer (FPO)
- ▶ Act as your primary Financial Advisor, coordinating the efforts of other related professionals as and when required
- ▶ Treat you with utmost respect and professionalism

KEYS TO A SUCCESSFUL RELATIONSHIP

WHAT I CAN EXPECT

I've learned through experience that effective communication and mutual respect are essential to a long-term partnership. A few other criteria which help define our success include:

Your commitment
to me as your
Financial Advisor

Your confidence in
my abilities to
provide you with
recommendations
and advice

Your complete
disclosure about
what matters most
to you

I need you to know that my recommendations are always based on helping you achieve your financial and lifestyle goals. It is important you understand that all investment, tax, estate and insurance advice will be based on the information you provide to me. Therefore, in order for me to offer recommendations and advice best suited to you, I need you to fully participate in the financial planning process with me.

MUTUAL RESPONSIBILITIES

Having a solid partnership is essential to effective financial planning. To this end, we both need to make your financial strategies a priority. We will agree to keep each other informed of any new developments that might affect these strategies. And we will agree to take the time to regularly review your Personal Financial Organizer.

We will always work together in the spirit of mutual honesty, respect, and understanding.



