

CONGRATULATIONS



Wealth Management Midwest
Wins 2018 Practice of the Year

Carson Group Coaching, one of the nation's leading financial advisor coaching programs, is thrilled to announce that Wealth Management Midwest has won its 2018 Practice of the Year Award. Carson Group Coaching, a consulting company that provides coaching for financial advisors all over the country, annually honors a wealth management firm from among its members that has significantly enhanced its service to clients and demonstrated a legacy through outstanding long-term growth. Founder & CEO, David Purdy, alongside President, Chad Olson, received the award on May 31st in Las Vegas, Nevada during Carson Group Coaching's national membership conference attended by nearly 1000 people. His practice was chosen from among some of the top wealth management practices in the nation. David Purdy has been a Carson Group Coaching member since 1998.

ABOUT WEALTH MANAGEMENT MIDWEST AND ITS TEAM

Wealth Management Midwest's team of professionals helps their clients regain control of their life and their financial future. Through financial planning, they uncover the "why" behind one's life goals and help them work toward becoming a reality. They help create a strategy and organize their financial life to prepare for the unexpected, and because of that, their clients will build the confidence they need to take control of the life they want to lead.



"Dave has always been a source of strength, confidence, and motivation for me. He inspires me to give 110% to the planning, education and experience we provide for our clients. We have been friends and worked together for nearly 25 years, and I still learn from him on a daily basis."

– Chad Olson, President of Wealth Management Midwest

Founder and CEO, Dave Purdy, of Wealth Management Midwest has worked alongside President, Chad Olson, for nearly 25 years. Together, they have developed one of the most successful financial advisory teams in the region. Their focus is to provide financial planning to their clients and to help keep them on track toward a meaningful and purpose-driven financial future.

"I've had the pleasure of working with Dave for over 13 years as his coach. His passion for helping others is infectious and with that enthusiasm, he truly could have been successful in any profession."

– Amy Koenig, Executive Business Coach; Carson Group

"I've known Dave Purdy since 1998 and he has always had an insatiable appetite to put the clients interest first and then work backwards. He's done what is right in his mission to serve his clients."

– Ron Carson, Founder & CEO; Carson Group

Securities and Advisory services offered through LPL Financial. A registered investment advisor. Member FINRA & SIPC. Carson Group Coaching's Practice of the Year nominees were selected by their coaches according to criteria such as: implementation of the Carson Group Coaching program, achievement of personal & professional goals, and practice success. These traits were still considered in the nomination process this year along with a couple of additional criteria. When nominating members, the coaches also considered: 1. Would I trust my family's investments with this advisor? 2. Would I work for this advisor?



WEALTH MANAGEMENT
M I D W E S T I N C

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