IM WEALTH PARTNERS

610-650-1848

IMWealthPartners.com

HOW CAN WE HELP YOU?

WE BELIEVE in building lifelong relationships with our clients and providing highly personalized service as we create and reassess your financial strategy.

Our team of specialists work together to optimize expertise and turnaround time, which drives toward our ultimate goal of a wonderful experience for you. Our systems are designed to ensure each team member, especially Ian, is aware of any changes to your plan.

***You should expect* that by design you'll hear from the below specialists on our team to ensure you can always get in touch with the right person at the right time.**

INITIAL & ONGOING PLANNING

Ian Meierdiercks
Founder and Chief Planner

Steve Ference
Planner
Info@imwealthpartners.com
CONTACT ME FOR:

- Implementation of your overall plan
- Coordination of information with your other professional advisors (accounting, mortgage, etc.)

Meghan Chambers
Client Liaison
Schedule@imwealthpartners.com
CONTACT ME FOR:

- Scheduling or rescheduling appointments or calls
- Any initial questions about our office location, process, or team

John Porrecca
Planner & Client Manager
Service@imwealthpartners.com
CONTACT ME FOR:

- Questions or changes regarding your overall plan
- Investment changes or re-allocations
- Account withdrawals or contributions
- Establishing or changing a systematic investment

NEW BUSINESS PROCESSING

Barbara Woessner
Insurance Processing
Barbara@imwealthpartners.com
CONTACT ME FOR:

- Any step of new life insurance, disability, or long-term care insurance
- Insurance applications
- Medical exams & doctor/medical records

Lauren Wernick
Investment Processing
Lauren@imwealthpartners.com
CONTACT ME FOR:

- Any step of your new investment processing
- Questions regarding the establishment of new investment accounts
- Questions regarding the transfer & rollover process

CLIENT SERVICE

Mary Crockett
Service Administrator
Service@imwealthpartners.com
CONTACT ME FOR:

- Questions or non-monetary changes to any existing investment account or insurance policy
- Online account access
- Address, beneficiary, or any other life changes
- Supports John Porreccca regarding service items

Paul Miller
Planning Administrator
Info@imwealthpartners.com
CONTACT ME FOR:

- Initial or updated information we have requested of you
- Information you would like to provide us

DEVELOPMENT & OPERATIONS

Connie McAluney
Process & Service Development

Jon Zerges
Director of Operations

- Oversees day-to-day operations
- Handles intricate and technical planning issues