The Wealth Consulting Group

YOUR PERSONAL CFO

MAKING LIFE BETTER

WHO WE ARE.

For many, understanding every aspect of personal finance can be daunting. From investments to retirement to insurance, the decisions can be overwhelming.

That’s where our firm comes in.

Whether you have significant assets to manage—or if you are just starting to accumulate wealth—we have the tools and background to provide the services that may fit your needs.

Our personal goal is to provide you with guidance that can help you understand and better define your financial goals. We work hard to create a mutually beneficial and respected long-term relationship with our clients and their families.

CLINTON AKERBERG

Managing Partner, Personal CFO

clinton@wealthcg.com
515-277-6462

An entrepreneur by nature with a passion for finance, Clinton's core competency lies in identifying effective and efficient solutions to complex problems.

As your Personal CFO and trusted advisor, Clinton delivers a customized Financial Planning Process and strives to bring the full spectrum of wealth management capabilities and resources necessary to address each client's unique financial needs along with socially responsible Investing and aligning our clients' core values with their investment portfolios.

A Lawrence, KS native, Clinton graduated from Iowa State University with a double major in International Business and Finance. He quickly put down roots in Des Moines and has worked closely with the Susan G. Komen Foundation and Ingersoll Board of Restoration. Clinton enjoys spending time with his English Cream Golden Retriever, Brinkley, as well as sailing, scuba diving, cycling, and skiing.

JOEL DRAKE

Managing Partner, Personal CFO

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515-410-9805

Joel's career in financial service began immediately after his graduation from Drake University (Finance) in 1991 when he joined Mass Mutual Life Insurance Company. His training included aspects of risk management, investment planning and estate planning with an emphasis on retirement planning. Through this emphasis, Joel became an Investment Specialist with Mass Mutual.

In this light, Joel spends his time counseling pre-retired and retired individuals as well as corporations seeking advice and consulting services with an emphasis on retirement, tax, investment and estate planning. In 2021, Joel joined the Wealth Consulting Group, and became a Registered Representative of LPL Financial.

Joel and his wife, Trish, were married in 1992 and together have 2 children, Brennan and Lauren. In his spare time, Joel enjoys golf, trips to the lake and is a long-time fan of the Iowa Hawkeyes!

JULIA MCCORMICK

CDFA®, RICP®, CFP®

Managing Partner, Personal CFO

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515-277-6462

Julia McCormick, CDFA® RICP® CFP® is a dedicated Personal CFO focusing on holistic wealth management.

Julia is passionate about helping her clients reach their retirement, accumulation, and business goals through formulating and implementing holistic financial plans. She sets herself apart through detailed cash flow planning and a talent for creating wealth management plans that reflect her client's values.

As a Retirement Income Certified Professional® and Certified Financial Planner™, she works with individuals, families, and small business owners. As a Certified Divorce Financial Analyst®, she is experienced in helping clients with their financial roadmaps during and after a divorce.

In addition to her work as a Personal CFO, she is a violist, playing in many Des Moines ensembles and an advocate for the live music scene in Des Moines. Julia and her husband, Kyle, and their three boys are proud residents of Urbandale, IA.

Nikki Reichardt

Director of Client Relationships/
Office Manager

nikki@wealthcg.com
515-277-6462

Nikki's core competency is her in-depth knowledge of wealth management and tax implications as well as her genuine care for our clients' needs and attention to detail when supporting advisors in implementing their Personal Financial Plans.

Pam Traeger

Partner, Client Operations

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515-410-9805

Pam Traeger joined Joel Drake at MassMutual in 2000 as a part-time assistant while her sons were in school. Now she is a full-time Client Services Manager. She spends her days working closely with our clients as a main point of contact for administrative questions. She is dedicated to the well-being of our clients and takes pride in the service she provides.

Jackie Akerberg

Operations Manager

jackie@wealthcg.com
515-277-6462

Jackie's core competency becomes apparent in her love for the organization. She ensures we have a process to support everything we do. This makes her a perfect fit for the Wealth Consulting Group team, as an organization is a key to our clients' success.

WCG Team Members

Amber Kodad, MBA, CFP®
Director, Advisor Resource Center

Megan Wilsey, CFP®, CPA
Financial Planner

Kathleen Talamayan
Financial Planning Coordinator

Alisa Foster
Paraplanner

AJ D'Addio
Financial Planning Assistant

Raymond Bell
Advanced Insurance Consultant

Jim Worden, CFA®, CMT®, CAIA®
Chief Investment Officer

Brian Foley, CFP®
Trading & Research Department Manager

William Tangog
Research Associate

Victor Orozco, CSRIC™
Investment Committee

Jimmy Lee
Investment Committee

Laura J. LaTourette, CFP®
Investment Committee

Chris Rand, Ph.D., CLU®, CFP®
Investment Committee

Mark Senseman
Investment Committee

Anthony Turcotte, Jr.
Investment Committee

Jim Worden, Christopher Rand, Mark Senseman, and Megan Wilsey are solely Investment Advisor Representatives of WCG Wealth Advisors, LLC, and not affiliated with LPL Financial.

The pCFO Formula

THE ROLE OF YOUR PERSONAL CFO
Your Personal CFO serves as the sources to assemble and integrate your team of consultants into a comprehensive and cohesive team.

At WCG, we believe that wealth management can only be achieved through a process-driven formula focused on preserving and managing all aspects of an affluent family's wealth. As your Personal CFO, we seek to bring the full spectrum of wealth management capabilities and resources necessary to address your complex financial needs. We collaborate with your other professional advisors to ensure a seamless coordination of your financial strategies, in a manner that places your interests first.

Comprehensive Wealth Planning

WHAT IS COMPREHENSIVE WEALTH PLANNING?

Our role as your **Personal CFO** and **Wealth Advisor** is to look at all areas of our client's wealth.

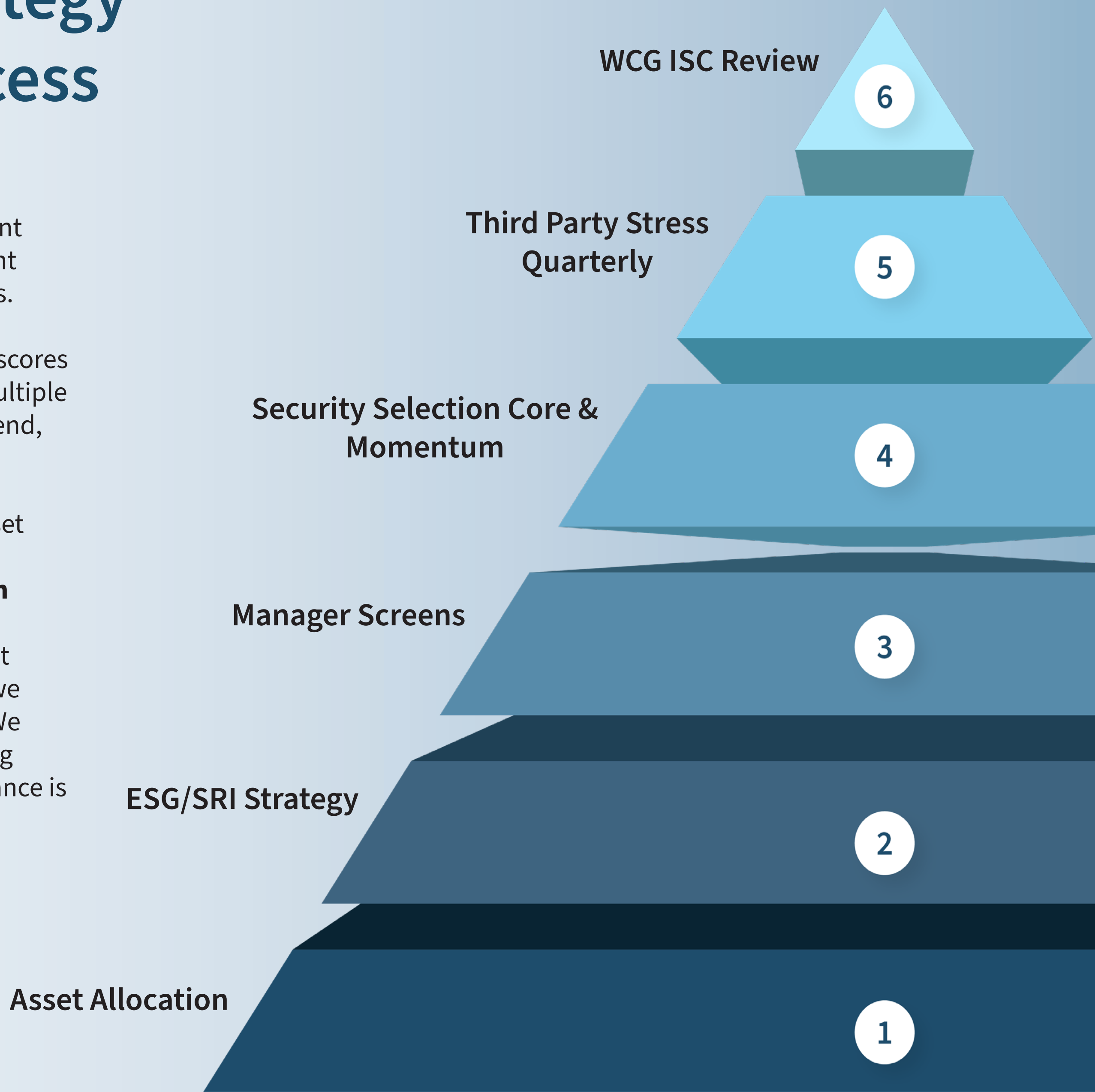
Our team manages investments and also understands and analyzes topics below the waterline, which are often hidden from plain sight. Looking at all areas of our clients' wealth is called **comprehensive wealth planning**, and helps guide you, your family, and your team to make the best decisions to make your money and wealth work for you.

Investment Strategy Committee Process

The ISC prioritizes providing an investment solution for strategies that have significant demand from both investors and advisors.

The firm has a proprietary database that scores nearly **5,000 individual securities** for multiple factors such as momentum, valuation, trend, volatility, return on capital, and more.

Our models are managed using a firm asset allocation strategy that is c**onsistently rebalanced and formally reviewed each quarter.** The firm's asset allocation is consistent across the different investment strategies and implemented using what we feel is the best security for each model. We may trade accounts for tax-loss harvesting throughout the year but an annual rebalance is typical for each strategy.



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