



MidWestOne™
PRIVATE WEALTH

**SMALL ENOUGH TO CARE.
BIG ENOUGH TO DELIVER.**

Your journey. Our guidance. Every step of the way.

You're creating a legacy
you are proud of.

You deserve a tailored financial
plan that helps you achieve
your unique financial mission
and values...today, tomorrow,
and into the future.

At MidWestOne Private Wealth, we combine
sophisticated financial planning and disciplined
investment management to deliver a custom
solution exclusively for you.

The MidWestOne Private Wealth difference
means providing you with a team of experts
across a variety of disciplines.

The team takes the time to listen, understand
your opportunities and challenges, and
problem-solve collaboratively. It is an ongoing
dialogue, because your circumstances are
always changing, and we are there with you
every step of the way.





When asked how they would describe MidWestOne Private Wealth, clients said that we are trusted partners who listen and care, with memorable teams who lead great conversations.

MidWestOne Private Wealth offers a team-based structure with tenured expertise across various financial areas. As an experienced fiduciary, we provide independent, research-driven strategies, and offer transparent, competitive cost structures. Our goal is to give you peace of mind by ensuring you are well-prepared for whatever the future holds.

Our clients receive:

- One single point of contact leading a team of financial subject matter experts.
- Exclusive private wealth offerings, including a dedicated private banker with special deposit and loan rates, and solutions to fit your needs.
- Comprehensive financial planning that addresses your lifestyle, legacy, and financial goals, while seeking to minimize risk.
- Long-term investment strategies with tactical shifts to take advantage of market opportunities that align with your risk tolerance objectives.
- An experience guided by our fiduciary standard, which means we always act in the best interest of you and your family.

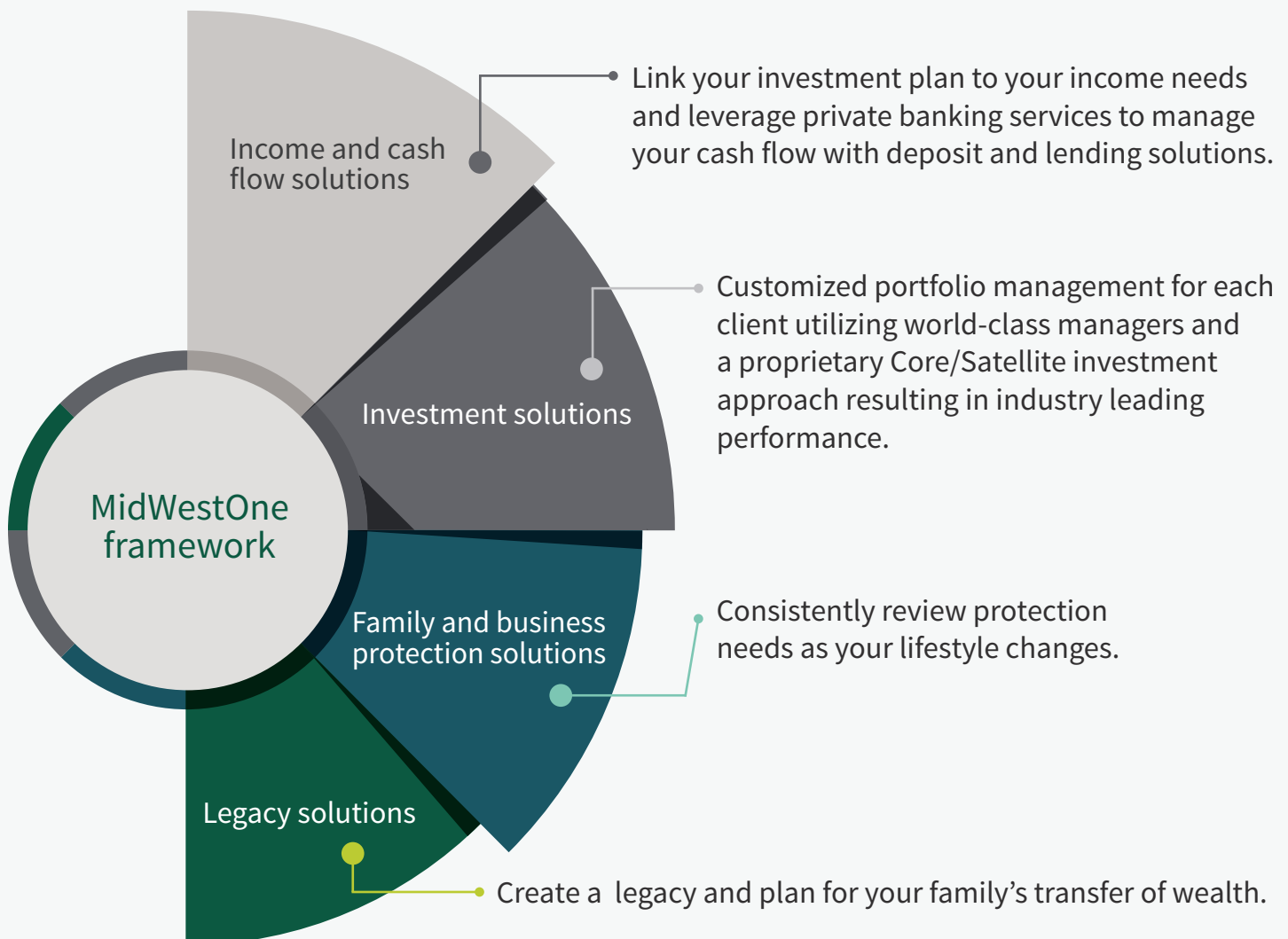
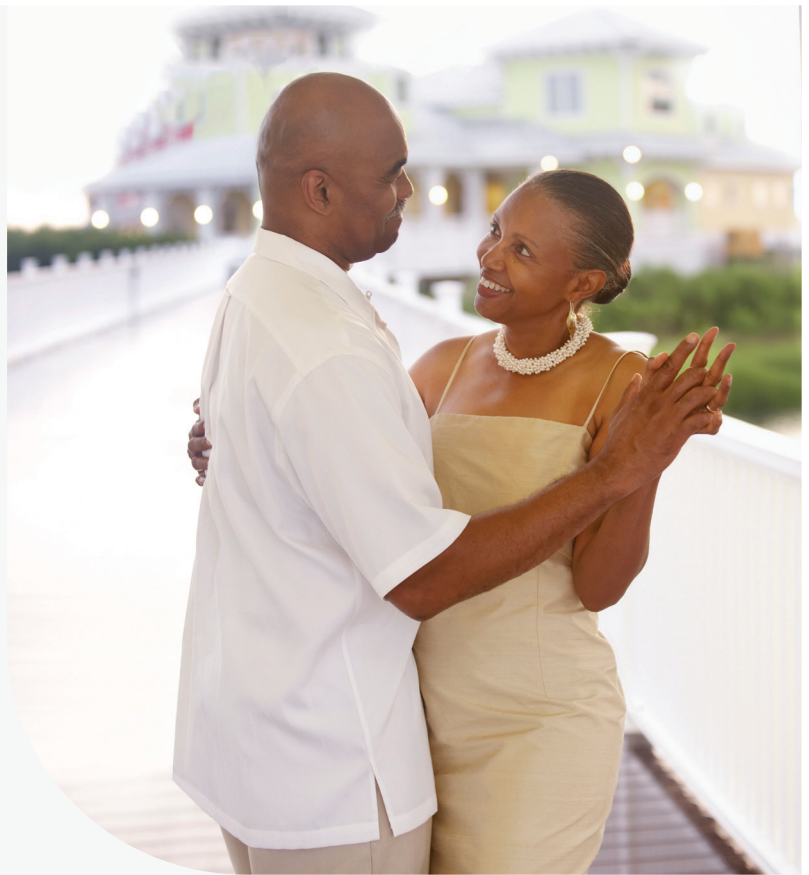


You are on a financial journey that can take many twists and turns over the years. At times that journey can be complex.

An experienced, dedicated guide that knows you, your needs, and your approach, can personalize a financial plan with specialized solutions. You are at the heart of this financial plan...the difference is you.

The MidWestOne framework starts with a financial plan. From that financial plan we can provide solutions that focus on four key areas of your life:

- Income and cash flow solutions
- Investment solutions
- Family and business protection solutions
- Legacy solutions



Building your financial plan, step by step

Creating the right financial plan starts with understanding your goals, values, and vision for the future. That's why we take a three-step approach to ensure your plan fits your needs.

- 1. Getting to know each other.** In our first meeting, we'll introduce you to the MidWestOne Private Wealth approach to financial planning and investment management.
- 2. Exploring your needs.** We'll dive deeper into your financial goals, opportunities, and challenges. You'll complete some simple exercises to help us get the full picture.
- 3. Creating your plan.** We'll present a personalized financial plan and investment strategy, walking you through what to expect as we put it into action.

By taking the time to understand your unique situation, we ensure your financial plan is built for success – both now and in the future.



Our relationship is grounded on clear and consistent communication.

Great planning starts with great communication. We take the time to understand your needs and create a long-term plan that works for you. Whether you prefer frequent check-ins or occasional updates, we tailor our communication to fit your style.

Life is always changing, and your financial plan should evolve with it. Through open conversations and collaborative problem-solving, we ensure your plan stays aligned to your financial mission and values. Regular updates and reviews help us make any necessary adjustments, so you can feel confident that your financial future is always on track.





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