

Grow and Protect Your Wealth With Objective Advice

West Financial Advisors, LLC is a fee-only wealth management firm located in the vibrant Des Moines East Village. Our firm helps people grow and protect their wealth with comprehensive personal financial planning unique for each client and a quantitative investment management approach. Make confident financial decisions throughout all life stages with an advisor acting in your best interest.

WEALTH MANAGEMENT SERVICES

Family & Home

- Home Affordability
- Debt & Mortgage
- College Planning
- Life & Disability Insurance
- Health / Medicare
- Assisted Living
- Long-term Care

Income & Investing

- Investment Management
- Tax Minimization Strategies
- Tax Return Preparation
- Cash Flow Planning
- Social Security Timing
- Pension Options
- Sustainable Portfolio Draws
- Required Distributions

Career & Business

- Employer Benefits
- 401k & IRA Rollovers
- Employer Stock Plans
- Deferred Compensation
- 401k Plan Management
- Retirement Planning
- Business Succession
- Farm & Real Estate

Lifestyle & Legacy

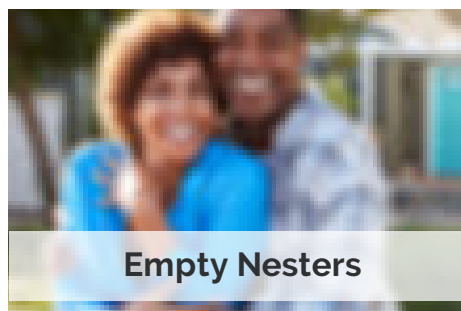
- Goal Funding Analysis
- Financial Confidence
- Total Well-being
- Joyful Living
- Purposeful Endeavors
- Charitable Gifting
- Estate Planning
- Wills & Trusts

WHO WE SERVE

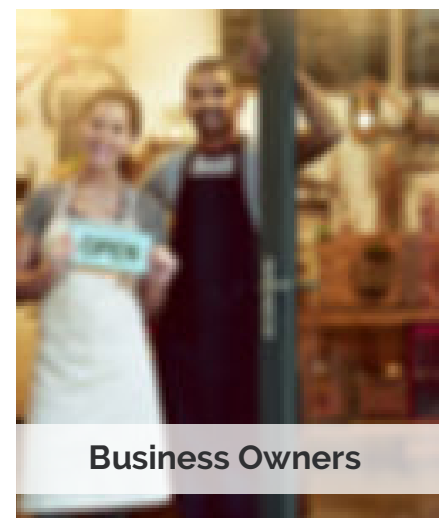
We serve discerning individuals, couples, and business owners throughout Iowa and across the country who have an independent spirit with high expectations for life and their financial advisor. Typically, people are seeking a plan of action to get on track with their financial goals and stay on track over time. Others need help making specific financial decisions during a life transition like the birth of a child, changing jobs, or retiring from a career. Most people want advice on complex financial decisions they are not comfortable doing alone anymore, such as preparing their income tax returns and making technical investment decisions.



Influential Women

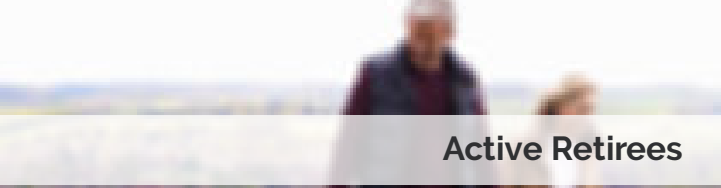


Empty Nesters

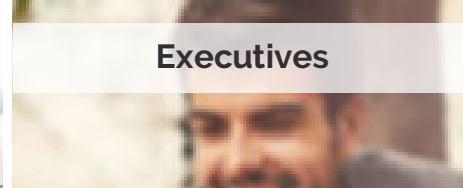


Business Owners

New Parents

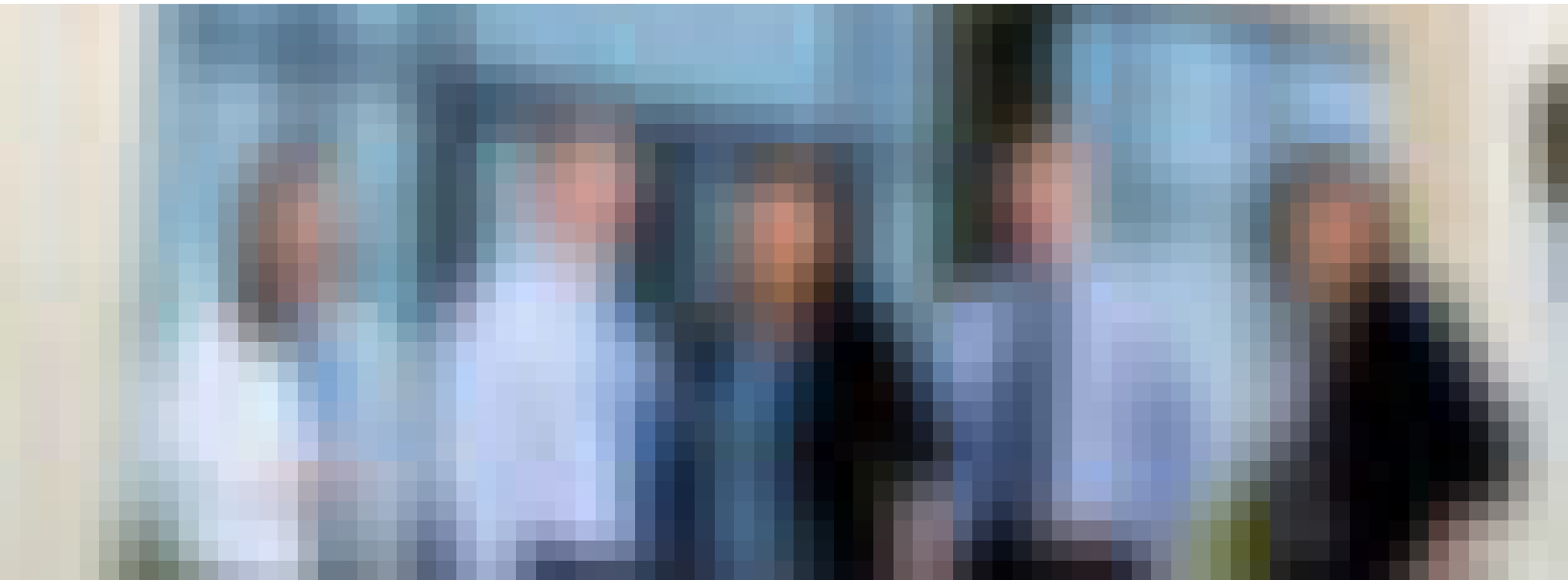


Active Retirees



Executives

MEET OUR TEAM



Check out our firm's blog.

Want to learn more about West Financial Advisors?



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Contact