

— 515-233-0307 —

**OUR PASSION IS TO ENHANCE
LIVES AND PEACE OF MIND**



comprehensive financial strategy that meets your unique needs.

FIND YOUR BALANCE BETWEEN YOUR GOALS & FINANCIAL MEANS

At Marrs Wealth Management, we understand the need to balance your current obligations with your future expectations, and we'll help you develop a plan to achieve that balance. With deep roots in this community, we enjoy working with Central Iowans who appreciate our long-term approach focusing on their goals.

Marrs Wealth Management

SHARE/EMBED



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WE UNDERSTAND THE NEED TO BALANCE YOUR
CURRENT OBLIGATIONS WITH YOUR FUTURE

SERVICES AND FIDUCIARY STANDARD



Financial Planning

Fiduciary Standard

FINANCIAL PLANNING

Marrs Wealth Management serves our clients by offering services in the following areas:

- Investment Management
- Tax Planning
- Cash Flow & Debt Reduction
- Retirement Planning
- Estate Planning
- Insurance Analysis
- Social Security Planning
- Asset Allocation

RESOURCE COORDINATION

It's important to build a team of professionals. We help coordinate and establish relationships with experienced professionals who have the same client centered values, which may include:

- CPA/Tax Professionals

- Corporate Trust Departments

OUR PROCESS

INITIAL MEETING

The goal of the first meeting is to get to know you, to learn about your financial situation and future goals. There is no cost to this first appointment. It is your opportunity to learn if Marris Wealth Management is the right fit for you.

CREATING YOUR PLAN

Once the decision has been made to work with Marris Wealth Management, we will begin with managing your accounts and start creating a plan. We explore your options and will make recommendations based on your goals, needs, and priorities.

IMPLEMENT THE PLAN

We will work with you every step of the way as we implement the agreed upon plan.

Coordination with other professionals may be considered or recommended at this time. This maybe the most intensive part of the process, but the best plans are the ones implemented.

CONTINUED SUPPORT/MONITORING

We will meet with you on a regular basis and review the plan and your accounts. We recommend meeting on a semi-annual basis and will adjust as needed. As you continue to move towards new milestones, we will be here to help create balance.

OUR TEAM







BrokerCheck – check
the background of this
investment professional >>

OUR FIRM



Recognition

History



NAMED ONE OF THE TOP 9 FINANCIAL ADVISORS IN IOWA BY ADVISORYHQ

Marrs Wealth Management, LLC was recognized for the fourth time in [AdvisoryHQ's 2019 Ranking of the Top Financial Advisors in Iowa](#). The firm was 1 of only 9 firms in the entire state of Iowa to be honored, and was the only firm in Ames with this award. The listing is designed to provide objective, comprehensive research to help the everyday consumer make informed financial decisions. All research performed is done from the consumer's perspective.

In its review, AdvisoryHQ rating summary for Marrs Wealth Management: "For investor looking for a comprehensive approach to financial management that puts them at the center of the plan, Marrs Wealth provides an excellent option to partner with. They put a strong emphasis on balancing needs with future goals, helping guide their clients to well-balanced strategy for success. With a wide range of financial advisory services and a fiduciary commitment to trust and transparency, Marrs Wealth Management solidifies their 5-star rating as one of the best financial advisors in Iowa to consider partner with in 2019."

LEARNING CENTER



Videos

FAQ

VIDEOS

Click the picture to start the video.

HOW MUCH INCOME DO YOU NEED IN RETIREMENT?

How much retirement income is enough? In this video, Marlena Lee, PhD, explains that the answer should be customized for each individual, based on their lifestyle and their income prior to retirement.

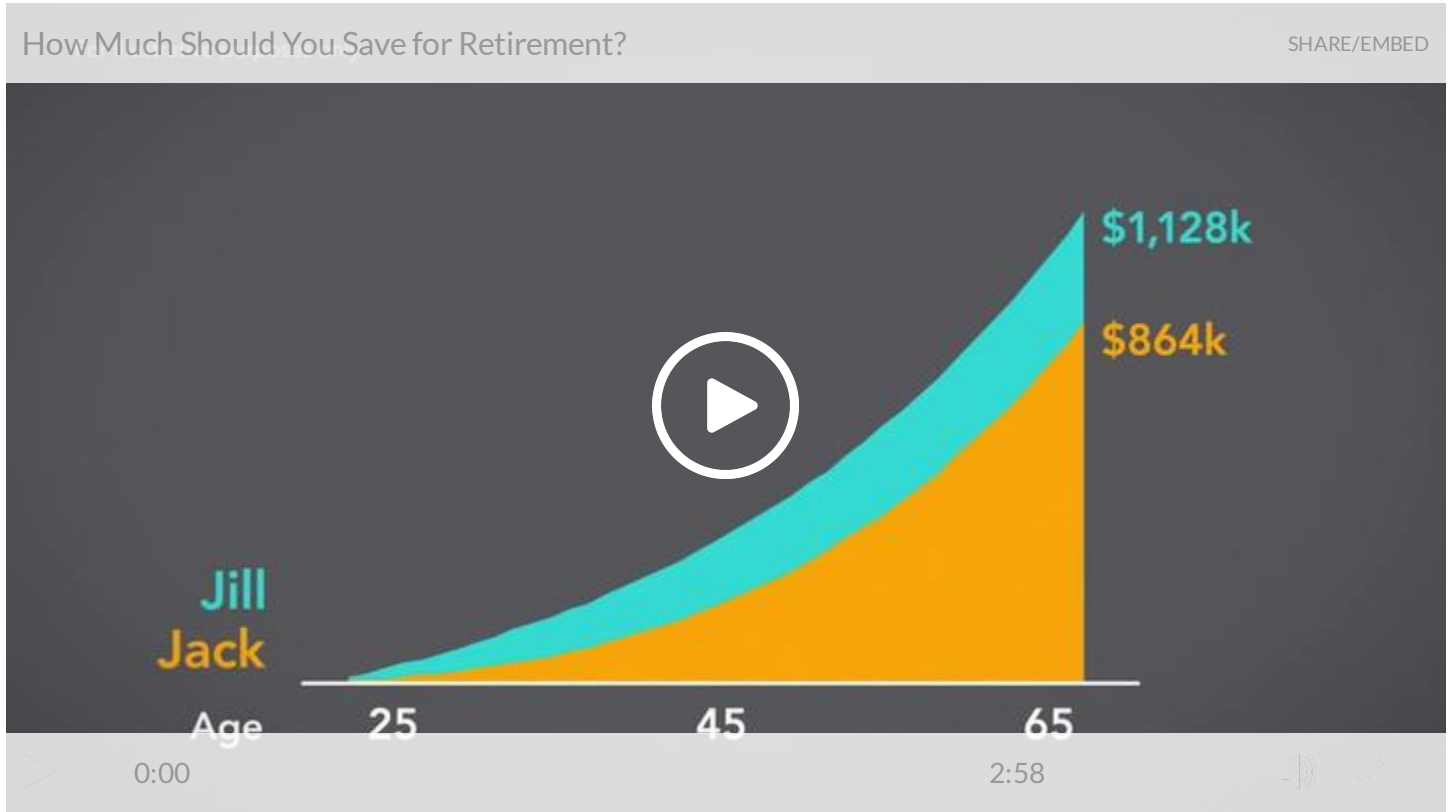
How Much Income Do You Need in Retirement? SHARE/EMBED

Earnings Group	Income Level	Components
Low Earners	>\$50k	Savings, Social Security
Middle Earners	\$50k-\$100k	Savings, Social Security
High Earners	<\$100k	Savings, Social Security

0:00 Low Earners Middle Earners High Earners 4:22

HOW MUCH SHOULD YOU SAVE FOR RETIREMENT?

How much should you be saving for retirement? Massi De Santis, PhD, explains that the answer should be customized for each individual, based on how their income grows prior to retirement.



A LONG-TERM APPROACH SUPPORTED BY THE
LATEST MODERN TECHNOLOGY

CLIENT CENTER



STAY CONNECTED

Fee-only financial planning and investment management you can count on. We serve clients in Ames and the surrounding area with in-person meetings and serve our clients nationwide virtually with video meetings. We are always only a phone call or email away.



EXISTING CLIENTS

If you are an existing client and have a comment or question, please fill out the form below. We will be in touch with you soon.

NAME

EMAIL

PHONE

MESSAGE

//

SEND

REQUEST INFORMATION

You can trust our complete commitment to your personal financial goals.

If you are interested in learning more about working together, we encourage you to schedule a 30-minute introductory call with our team.

CONTACT INFORMATION

Location	313 Fifth Street Suite 101 Ames, IA 50010
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