Wealth Management Services®
at DECORAH BANK & TRUST CO.

Helping People Create Plans Aiming to Accumulate, Preserve, & Transfer Wealth

Located at:

Decorah Bank & Trust Co.
202 East Water Street
Decorah, Iowa 52101
563.382.9661

Cresco Bank & Trust Co.
A division of Decorah Bank & Trust Co.
126 Second Ave SE
Cresco, Iowa 52136
563.547.2244

For more information on how Wealth Management Services can help you address your financial goals, please contact:

www.decorah.bank/wealth

Jason Soland, Tracy Dostal, and Chad Mills

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Our Mission...

Helping people create plans aiming to accumulate, preserve, and transfer wealth.

- Financial Advice
- Estate & Inheritance Planning
- Retirement Planning
- College Education Planning
- Portfolio Reviews
- Investment Advice & Management
- Traditional & Roth IRA's
- IRA Rollover Services
- 401k & Retirement Plan Transition Services
- Corporate & Municipal Bonds
- Mutual Funds
- Stocks
- Real Estate Investment Trusts (REITs)
- Exchange Traded Funds (ETFs)
- Unit Investment Trusts (UITs)
- Fixed & Variable Annuities
- Life & Disability Insurance
- Long Term Care Insurance

What We Do...

We integrate five key areas of financial planning:

Asset Protection and Risk Management
Including proper coverage of life insurance, disability, and long term care.

Asset and Debt Management
Including cash flow analysis, investing requirements, and asset allocation.

Tax Strategies for Investments
Including tax managed, tax efficient, and tax deferred investing.

Preparing for Retirement
Including helping to design retirement goals, strategies, and allocation of resources, which include IRA and 401k design assistance.

Estate Planning
Including business succession planning and efficient distribution of assets to future generations and/or charities.

Who our clients are...

Our clients are people who realize that coordinating and managing today's financial decisions will help them address their goals for tomorrow. They want to simplify their lives and are willing to enter into a long-term relationship that is mutually beneficial.

Find us online at www.decorah.bank/wealth