



*President and
Chief Executive Officer*

Practice Focus

- Wealth Management
- Financial Planning
- Investment Advisory Services
- Tax-Advantaged Investing Strategies
- Estate Planning

Education/Certification

- Chartered Financial Consultant® (ChFC®)
- Chartered Life Underwriter® (CLU®)

Affiliations

- Past President, Cherokee, IA Jaycees
- Past President, Kiwanis Club of Johnston
- Member, Des Moines Chapter High 12 Masonic Lodge
- Member, Road Runners Shrine Club
- Life Member, American Legion
- Member, AMVETS

Media Resource

- Talk Radio Program Guest – WHO-Radio in Des Moines, IA
- Book Co-author – *Financial Success in the Year 2000 and Beyond*

Terry A. Vrieze, ChFC®, CLU®

Terry Vrieze is an independent financial planner and investment advisor representative specializing in helping women in transition make smart decisions about their money allowing them to spend more time doing what they love. Terry focuses on solving complex financial issues by acting as his clients' personal chief financial officer on wealth management issues such as restructuring accounts and estate planning. Believing that money impacts all areas of a person's life, he has developed relationships with a network of professionals who can provide women the assistance they need—from a lawyer who can help settle a spouse's estate to a handyman who can fix the roof.

Terry places a strong emphasis on educating his clients and the community. He believes that with a priority on learning comes knowledge, and with maturity comes increased wisdom. With nearly four decades of experience in the financial industry, he has dedicated the majority of his working career to helping individuals achieve fuller and financially secure lives. Well respected by his colleagues and friends, Terry co-authored a book titled *Financial Success in the Year 2000 and Beyond*.

Terry began his undergraduate studies at Northwestern College in Orange City, IA and continued his studies at Drake University. He went on to fulfill the requirements to become a Chartered Financial Consultant® and Chartered Life Underwriter®. Believing that a person can never stop learning, Terry continues to take advanced courses in the areas of estate planning, tax mitigation, wealth management and philanthropic planning.

Terry takes his responsibility to the community seriously. He was past president of Cherokee Jaycees, an organization that offers leadership training through community development for young men and women; and the Kiwanis Club, In addition, Terry is a member of the Des Moines Chapter High 12 Masonic Lodge; the Road Runners Shrine Club, an organization that volunteers and raises funds to support children's program throughout the world; and a Life Member of the American Legion and AMVETS.