

Personal Financial Management Securities America, Inc.

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*Investment Advisor Representative
Securities America Advisors, Inc.*

Practice Focus

- Wealth Management
- Investment Advisory Services
- Asset Allocation
- Retirement Planning Strategies
- Estate Planning

Education / Certification

- Chartered Life Underwriter® (CLU®)
- Chartered Financial Consultant® (ChFC®)
- BA, Iowa State University, Ames, Iowa

Affiliations

- Qualifying Member, Securities America Masters Forum
- Member, National Association of Insurance and Financial Advisors (NAIFA)
- Member, Cedar Rapids Chamber of Commerce
- Member, Toastmasters

Media Resource

- Radio Talk Show Co-Host, WMT-AM600 "Money Class"
- KCRG-TV9, Interview Segment

Monte S. Marti, CLU, ChFC

Monte Marti has been helping people take control of their financial futures for nearly two decades. Prior to establishing his own firm, Marti Financial Management, and joining Securities America in 2002, he provided investment planning for the MONY Group. Before that, he gained valuable experience working as a commodities broker.

Monte enjoys helping clients refine their goals and develop a prudent financial plan. He specializes in providing cash flow analysis, asset allocation and tax planning strategies to individuals who are either getting ready for retirement or those who have recently retired. Monte feels this period of transition can be very difficult; it requires uncompromising attention to detail and proactive advice.

As a professional who's committed to client education, Monte understands that an informed individual has a better chance of achieving their most important life goals. He helps people navigate myriads of personal and financial choices by providing the practical tools they need to make sound investment and financial decisions.

Having studied Agricultural Business with a minor in economics, Monte graduated from Iowa State University in Ames, Iowa. He went on to fulfill the requirements to become a Chartered Financial Consultant® and Chartered Life Underwriter®. Monte has consistently been recognized by Securities America as a top advisor representative through membership in the Masters Forum.

When not working, Monte is still on the run...literally. He is an accomplished marathon runner; at one time placing in the top 1% of all runners. Supporting fellow runners within his community, Personal Financial Management is a corporate sponsor of the largest area road race. In addition, Monte owns and operates an apple orchard on a farm that has been in his family for over 100 years. Now this guy really knows how to take a bite out of life.