

January 8, 2015

To the Business Record "Forty Under 40" selection judges:

I am nominating Jim Thompson for your consideration in selecting the 2015 class of Forty under 40 honorees. In the nearly five years that I have known him, Jim has exemplified professional achievement, community engagement, and devotion to family.

I met Jim (the owner of Value Wealth Management) when he hired me in 2010 to join the firm as a financial analyst. I was surprised that in the financial planning field dominated by practitioners over 50, this independent advisor (who owned his own practice) was relatively young. Even though he looked young, Jim Thompson was already an experienced and accomplished financial professional.

Jim has a Bachelor of Science in Business Administration from Drake University. He earned an MBA from the Tippie School of Management at the University of Iowa. He is a CFA Charterholder and holds the CFP® certification. Jim has experience in multiple areas of finance. In different positions he has analyzed real estate, equity, fixed income, and high-yield. He has progressed from roles as intern, to that of Director-Investment Strategy & Equity Research. After assisting his own parents with financial planning and estate planning, Jim discovered his true passion was working with those individuals in need of personal wealth management and financial planning services.

Jim earned the trust and respect of Phil & Barb Svanoe (owners and advisors of Value Wealth Management, then called Svanoe & Svanoe, LLC, later to be renamed Svanoe & Thompson, LLC, before finally landing on the name Value Wealth Management). In April 2008, Jim began working at the firm with a buy-out plan in place. The financial crisis of 2008 was Jim's welcome to the world of owning a financial practice. Undeterred to achieving his goal of owning and operating a wealth management practice, Jim actually used the crash as an opportunity to accelerate his purchase of the business (perhaps when others would have cut and run from the original deal).

While weathering the great recession, Jim took aim to grow the business. This involved growing the client base and adding staff (including myself). As an employee, I have always been impressed with how Jim has managed the business, provided excellent service to his clients, and cared for his employees. I look to Jim as a mentor and he has devoted a fair amount of his time to guiding me towards a career path. Most recently, Jim has provided much insight and support while I prepared for the CFP exam.

Jim has been recognized for his investment expertise and as such participated in panel discussion at the 2013 "This Land is Your Land" US Farm Lease conference in Altoona. He has also received invitations to participate in investment advisory committee meetings at River Glen Wealth Counselors.

Besides providing his services to clients, and his mentorship to employees, Jim devotes time and energy to multiple causes in the community. Giving back to his Alma Mater, Drake University, Jim volunteers as part of the Equity Valuation & Analysis seminar as part of Drake's Krause Challenge Fund. Through his connection with Drake business faculty, Jim taught as an adjunct professor, one semester of an intro to corporate finance course.

Through his children, Jim is involved in the West Des Moines school district. He has served as a coach or assistant coach for multiple youth sports teams and is involved in Cub Scouts. More recently, Jim became involved with KCNQ2 research and the Jack Pribaz Foundation after his youngest daughter was diagnosed with extremely rare genetic mutation. Jim volunteered at the 2014 American Epilepsy Society annual meeting, networking with geneticists, epileptologists, research neurologists, and genetics labs to promote awareness of and research for solutions to benefit children with KCNQ2 epileptic encephalopathies. Jim works hard a business, but knows how to balance work life and family, making a point to be there (or many times coach) for his children.

With Jim's involvement with community, his impressive resume of degrees and designations, and professional accomplishment with business ownership, I ask you to seriously consider him for the honor of a Forty under 40.

Sincerely,

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