Marcus L. Iwig, CPA, CFP®

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**Mission Statement:**

I strive to help others see endless possibilities by instilling confidence and connecting them to strategic relationships and resources.

**WORK EXPERIENCE**

*Foster Group – West Des Moines, Iowa: June 2014 – Present*

**Advisor**

* Develop creative ways for Foster Group to fulfill its mission in the community and world at large.
* Help grow the firm by seeking new client and strategic relationships where Foster Group can add value for an individual or organization.
* Gain comprehensive understanding of the client’s, values, goals, relationships, and interests to understand what they are hoping to use their resources for.
* Create a comprehensive wealth plan that addresses all areas of the client’s financial life.
* Develop investment strategies that align with client goals.
* Develop charitable giving strategies that maximize the use of the client’s resources and create the greatest impact possible for the causes the client wishes to benefit.
* Review client risk exposures and develop mitigation strategies that provide adequate coverage for identified risks.
* Assist business owners in developing succession strategies that align with their goals.
* Consult on education savings strategies for children and grandchildren.
* Connect clients with other advisors, such as attorneys, to insure that their estate plan stays current and that all significant life changes are addressed as needed.
* Coordinate communication among other advisors for the client to insure that pertinent information is shared and that all advisor strategies are aligned.

*Foster Group – West Des Moines, Iowa: July 2011 – June 2014*

**Associate Advisor**

* Coordinate client/prospect experience with all other departments of Foster Group.
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* Attend meetings with client/prospect to understand client’s values, goals and financial situation.
* Analyze client/prospect information and help develop financial plan and investment allocation recommendations.
* Execute activities to implement or adjust financial plan.
* Use tax background to help develop charitable gifting strategies for individual clients.
* Act as the initial line of contact for client requests and questions.
* Contribute to investment research efforts for both prospect portfolios and internal investment solutions.

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*FBL Financial Group – West Des Moines, Iowa: May 2011- July 2011*

**Accountant – Corporate Planning – Cost Benefit Analysis**

* Cost Benefit Analysis on Companywide projects over $250K.
* Communicated with many different departments and levels of management to gain understanding of their operations and the reasons for projects.
* Accumulated information to calculate the internal rate of return on projects as well as understand the soft benefits of each project.
* Helped summarize findings of analysis for Senior Management Committee.

*FBL Financial Group – West Des Moines, Iowa: September 2007 – May 2011*

**Staff Accountant – Investment Accounting**

* Accounted for and tracked billions of dollars in financial assets.
* Researched and communicated findings on accounting topics to multiple levels of management.
* Communicated and helped educate other departments on quarterly investment results.
* Developed more efficient quarterly reconciliation processes to improve the speed of quarterly reporting by numerous days.
* Part of a committee that screened industry regulation changes and provided affected accounting areas with relevant information.
* Developed new accounting procedures to make rent and expense processing more efficient.

*Deloitte – Des Moines, Iowa: August 2006 - September 2007*

**Tax Consultant II**

* Prepared tax returns for partnerships, S-Corporations, C-Corporations, Non-Profits, and Individuals.
* Developed and maintained work papers to help complete the returns.
* Completed research and communicated findings about sales and use tax topics.
* Responsible for tracking fixed assets for clients on FAS system.

*Deloitte – Des Moines, Iowa August 2005 - August 2006*

**Staff Auditor**

* Met with numerous client personnel to understand and document flow of transactions for audit procedures.
* Utilized communication and personal skills with clients to obtain and understand information and maintain a client service relationship.
* Participated on audits of insurance, utility, and manufacturing companies, as well as a collegiate athletic department.
* Completed testing of accounts to check for material discrepancies.
* Contributed to Sarbanes Oxley testing at large financial client.

**EDUCATION**

*Iowa State University - Ames, Iowa: August 2004 to August 2005*

Masters of Accounting

Graduation: August 2005

Cumulative GPA: 3.92/4.0

* Worked as Teaching Assistant offering weekly supplemental instruction.

*Iowa State University - Ames, Iowa: August 2000 to August 2004*

Major: Accounting with Distinction

Graduation: August 2004

Cumulative GPA: 3.68/4.0

**HONORS**

* Zero Alpha Group Leadership Institute

**ACTIVITIES**

* West Polk County Rotary Member
* Member of the Financial Planning Association of Iowa
* Financial Planning Association of Iowa Pro Bono Chair
* 2015 Money Smart Week Volunteer
* American Institute of CPA’s Member
* Iowa Society of CPA’s Member
* Iowa Society of CPA’s Financial Literacy Committee – 2013-2014
* Junior Achievement Volunteer – 2009 and 2010.
* Assistant varsity and junior varsity basketball coach for Iowa Christian Academy in West Des Moines – 2009 and 2010.
* Youth Group leader at Meredith Drive Reformed Church 2005-2015
* Sunday school teacher at Meredith Drive Reformed Church
* Church Mission Endowment Committee