

# **NORTHWEST WEALTH MANAGEMENT, LLC**

FORM ADV – SCHEDULE 2B SET

March 5, 2015

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**SCHEDULE 2B - BROCHURE SUPPLEMENT**

**John G. Lauer**

March 5, 2015

**NORTHWEST WEALTH MANAGEMENT, LLC**

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**This Brochure Supplement provides information about John Lauer that supplements the Northwest Wealth Management, LLC (“NWM”) brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about John G. Lauer (CRD No. 1467522) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## ***Item 2 - Educational Background and Business Experience***

Mr. Lauer attended Purdue University majoring in Economics for 2.5 years. His business activities since 1983 have been 100% insurance/investment related. Prior to entering the financial business in 1983 Mr. Lauer owned a chain of 11 retail health food stores. He also carries the designation of Certified Financial Planner™ (CFP®).

He was an Investment Adviser Representative and Officer with Compass Financial Advisors from 1984 to 2010. He was with Aetna Life Insurance and Annuity Company from 1987 to 1990. From 1987 to 2003 he was a Registered Representative of Mutual Service Corporation, from 2003 to 2007 he was a Registered Representative with Questar Capital Corporation and an Investment Adviser Representative with Questar Asset Management from 2005 to 2007. In 2007 he joined Fintegra, LLC as a Registered Representative. He formed NWM in April 2010.

He has passed the FINRA Series 6 Investment Company Products/Variable Contracts Representative exam, Series 7 General Securities Representative exam, Series 24 General Securities Principal exam, Series 51 Municipal Fund Securities Limited Principal exam, Series 63 Uniform Securities Agent State Law exam and Series 65 NASAA Investment Advisors Law exam.

The CFP® certification is granted by Certified Financial Planners Board of Standards, Inc.. The certification is voluntary; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education - Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or it's equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination - Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience - Complete at least three years of full-time financial planning-related experience (or equivalent, measured as 2,000 hours per year); and
- Ethics - Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individual who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education - Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics - Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interest of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

### ***Item 3 - Disciplinary Information***

He does not have any disciplinary information to disclose. He has not: (a) been party to a reportable criminal or civil action in a domestic, foreign or military court; (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

### ***Item 4 - Other Business Activities***

He is one of the managing members of Goldstar Private Capital Fund One, LLC, a private equity fund, he devotes approximately 10 to 20 hours a month to this. He is the owner of Goldstar Management, LLC which manages private equity, he devotes approximately 20 hours a month to this.

### ***Item 5 - Additional Compensation***

He may receive compensation for his involvement in the activities noted above, but he does not receive any additional economic benefit from third parties for providing advisory services.

### ***Item 6 - Supervision***

Mr. Lauer is the Chief Compliance Officer for NWM, therefore, he is responsible for his own supervision and that of all other investment adviser representatives of NWM. His contact information is available on the cover page of this Schedule 2.B.

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**SCHEDULE 2B - BROCHURE SUPPLEMENT**

**Sharon A. Lisac**

March 5, 2015

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**This Brochure Supplement provides information about Sharon Lisac that supplements the Northwest Wealth Management, LLC (“NWM”) brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Sharon A. Lisac (CRD No. 4521667) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

***Item 2 - Educational Background and Business Experience***

Ms. Lisac graduated from the University of Iowa with a BBA in Finance. She has been in the financial services industry since 1986 and prior to joining Northwest Bank, spent 22 years with Wells Fargo Bank. Sharon has worked with Private Banking clients since 1993 offering her expertise in deposit, credit, mortgage, investment and retirement planning to help her clients reach financial success. Sharon also holds licenses in Life, Accident and Health insurance. She joined NWM as an investment adviser representative in April 2010.

She is also active in Sacred Heart Catholic Church, Animal Rescue League and the Make-A-Wish Foundation.

She has passed the FINRA Series 7 General Securities Representative exam and Series 66 NASAA Uniform Combined State Law exam.

***Item 3 - Disciplinary Information***

She does not have any disciplinary information to disclose. She has not: (a) been party to a criminal or civil action in a domestic, foreign or military court; (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

***Item 4 - Other Business Activities***

She is not actively engaged in any other investment related business activities.

***Item 5 - Additional Compensation***

She does not receive any additional economic benefit from third parties for providing advisory services.

***Item 6 - Supervision***

Ms. Lisac is supervised by John Lauer, NWM's Chief Compliance Officer. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Ms. Lisac provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.

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**SCHEDULE 2B - BROCHURE SUPPLEMENT**

**Christopher M. Benda**

March 5, 2015

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**This Brochure Supplement provides information about Christopher Benda that supplements the Northwest Wealth Management, LLC (“NWM”) brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Christopher M. Benda (CRD No. 5039416) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## ***Item 2 - Educational Background and Business Experience***

Mr. Benda has a Bachelor of Business Administration from Texas Tech University. He also holds the Certified Investment Management Analyst (CIMA®)

Prior to joining Northwest Wealth Management he was an Advisor for Ameriprise Financial Advisors from 2008 to September 2010 , for H&R Block Financial Advisors in 2007 and Edward Jones from 2005 to 2007.

He has successfully passed the FINRA Series 7 General Securities Representative exam, Series 31 Futures Managed Funds exam, Series 63 Uniform Securities Agent State Law exam and Series 66 NASAA Uniform Combined State Law exam.

The CIMA certification signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for investment management consulting, including advanced investment management theory and application. Prerequisites for the CIMA certification are three years of financial services experience and an acceptable regulatory history. To obtain the CIMA certification, candidates must pass an online Qualification Examination, successfully complete a one-week classroom education program provided by a Registered Education Provider at an AACSB accredited university business school, and pass an online Certification Examination. CIMA designees are required to adhere to IMCA's Code of Professional Responsibility, Standards of Practice, and Rules and Guidelines for Use of the Marks. CIMA designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. The designation is administered through Investment Management Consultants Association (IMCA).

## ***Item 3 - Disciplinary Information***

He has not been party to a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

## ***Item 4 - Other Business Activities***

He is not actively engaged in any other investment related business activities.

## ***Item 5 - Additional Compensation***

He Benda does not receive any additional economic benefit from third parties for providing advisory services.

## ***Item 6 - Supervision***

John Lauer is responsible for the supervision of Mr. Benda. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Mr. Benda provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.



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SCHEDULE 2B - BROCHURE SUPPLEMENT

**Jame N. Christiansen**

March 5, 2015

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**This Brochure Supplement provides information about Jame Christiansen that supplements the Northwest Wealth Management, LLC (“NWM”) brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Jame N. Christiansen (CRD No. 4524360) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

***Item 2 - Educational Background and Business Experience***

Mr. Christiansen graduated with a Bachelor of Business Administration with a Major in Finance and Insurance from Northwest Missouri State University in 1977. He also served in the US Army from 1972 to 1974.

In 2008 he joined Northwest Bank as the President of Private Banking. From 1988 and until he joined Northwest Bank, he worked in banking and private banking at Norwest Bank which was eventually purchased by Wells Fargo, Inc. where Mr. Christiansen was the Manager of Private Client Services.

He has successfully passed the FINRA Series 7 General Securities Representative exam and the Series 66 Uniformed Combined State Law exam.

***Item 3 - Disciplinary Information***

He has not been party to a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

***Item 4 - Other Business Activities***

He is a full time employee of Northwest Bank, President of Private Banking. He has no other outside investment related business activities.

***Item 5 - Additional Compensation***

He does not receive any additional economic benefit from third parties for providing advisory services.

***Item 6 - Supervision***

John Lauer is responsible for supervision of any investment advisory related activity. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Mr. Christiansen provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.

SCHEDULE 2B - BROCHURE SUPPLEMENT

**Randy L. Immeker**

March 5, 2015

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**This Brochure Supplement provides information about Randy Immeker that supplements the Northwest Wealth Management, LLC (“NWM”) brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Randy L. Immeker (CRD No. 1184347) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## ***Item 2 - Educational Background and Business Experience***

Mr. Immecker attended Northwestern College in Orange City Iowa.

He has worked in the financial services industry with Prudential Life Insurance Company since 1982, more recently joining Money Concepts in 2004 and operating an independent financial planning practice in Sioux Center Iowa until joining Northwest Wealth Management in September 2010.

He has successfully passed the FINRA Series 6 Investment Company Products/Variable Contracts Representative exam, Series 7 General Securities Representative exam, Series 63 Uniform Securities Agent State Law exam, and Series 65 Uniform Investment Advisor Law exam.

He is a Certified Financial Planner™ (CFP) , a Charter Life Underwriter (CLU), and a Chartered Financial Consultant (ChFC).

The CFP® certification is granted by Certified Financial Planners Board of Standards, Inc.. The certification is voluntary; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients. Currently, more than 62,000 individuals have obtained CFP® certification in the United States.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education - Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or it's equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning;
- Examination - Pass the comprehensive CFP® Certification Examination. The examination, administered in 10 hours over a two-day period, includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances;
- Experience - Complete at least three years of full-time financial planning-related experience (or equivalent, measured as 2,000 hours per year); and
- Ethics - Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individual who become certified must complete the following ongoing education and ethics requirements in order to maintain the right to continue to use the CFP® marks:

- Continuing Education - Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of*

*Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and

- Ethics - Renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interest of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

The CLU or Chartered Life Underwriter® designation is granted by The American College to those individuals whom have completed a program and passed a 100 questions examination covering the application of life and health insurance in filling needs for survivor income, estate planning, business continuation and employee benefits. The individual must also meet experience and ethical standards and achieve continuing education requirements.

The ChFC® designation is granted by The American College after successfully completing the program which requires the candidate to complete 7 required courses including Financial Planning: Process and Environment, Fundamentals of Insurance Planning, Income Taxation, Planning for Retirement Needs, Investments, Fundamentals of Estate Planning and Financial Planning Applications; 2 elective courses; complete three years of full-time business experience; agree to comply with The American College Code of Ethics and Procedures; and complete on-going continuing education requirements.

### ***Item 3 - Disciplinary Information***

He has not been party to a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

### ***Item 4 - Other Business Activities***

He is not actively engaged in any other investment related business activities.

### ***Item 5 - Additional Compensation***

He does not receive any additional economic benefit from third parties for providing advisory services.

### ***Item 6 - Supervision***

John Lauer is responsible for supervising Mr. Immecker. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Mr. Immecker provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.

SCHEDULE 2B - BROCHURE SUPPLEMENT

**Lance B. Evans**

March 5, 2015

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**This Brochure Supplement provides information about Lance B. Evans that supplements the Northwest Wealth Management, LLC ("NWM") brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Lance B. Evans (CRD No. 4433785) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## ***Item 2 - Educational Background and Business Experience***

Mr. Evans was born in 1977. He graduated from the University of Iowa with a Bachelor's Degree in Economics. He has earned the designation of AAMS® (Accredited Asset Management Specialist).

He was an Investment Adviser Representative with Edward Jones from 2001 until 2011 when he joined NWM.

He has successfully passed the FINRA Series 7 General Securities Representative Exam, Series 63 Uniform Securities Representative State Law Exam and the Series 66 Uniform Combined State Law Exam.

The AAMS® designation is granted by The College of Financial Planning to students who:

- successfully complete the program;
- pass the final examination; and
- comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct and Terms and Conditions. Applicants must also disclose of any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct. Conferment of the designation is contingent upon the College for Financial Planning's review of matters either self-disclosed or which are discovered by the College that are required to be disclosed.

Every two years individuals must renew their right to continue using the AAMS® designation by:

- completing 16 hours of continuing education;
- reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions, and self disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct; and
- paying a renewal fee.

## ***Item 3 - Disciplinary Information***

He has not been party to a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

## ***Item 4 - Other Business Activities***

He is a partner in Blue Water Capital, a partnership that owns real estate. He is a member of Intrinsic Value, LLC, a limited liability company that makes investments in various private investments and E&F Investments LLC, a limited liability company which owns commercial real estate. He is not actively engaged in any other investment related business activities.

## ***Item 5 - Additional Compensation***

He does not receive any additional economic benefit from third parties for providing advisory services.

***Item 6 - Supervision***

John Lauer is responsible for supervising Mr. Evans. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Mr. Evans provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.



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**SCHEDULE 2B - BROCHURE SUPPLEMENT**

**Ryan P. Mehalovich**

March 5, 2015

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**This Brochure Supplement provides information about Ryan P. Mehalovich that supplements the Northwest Wealth Management, LLC (“NWM”) brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Ryan P. Mehalovich (CRD No. 5272363) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## ***Item 2 - Educational Background and Business Experience***

Mr. Mehalovich was born in 1981. He attended Iowa State University for two years and then graduated from the University of Iowa where he received a Marketing and Entrepreneurship Certificate from the Tippie College of Business. He has also earned the Retirement Plan Fundamentals (RPF) certification with the American Society for Pension Professionals and Actuaries (ASPPA).

He was with Ingamells Commercial Flooring from 2002 until 2006 as an Internal Excavation Assistant. In January 2007 he joined Edward Jones as a Registered Representative until April 2011, then he became a Registered Representative with VSR Financial Services and an Investment Adviser Representative with VSR Advisory Services from April 2011 until January 2012. In January 2012 he joined NWM as an Investment Adviser Representative.

He has successfully passed the FINRA Series 7 General Securities Representative Exam, and the Series 66 Uniform Combined State Law Exam.

The RPF program through the ASPPA is designed to convey the broad base knowledge necessary for retirement plan professionals. The course is divided into two parts including Retirement Plan Fundamentals Part 1 and Elegant Ethical Solutions and Retirement Plan Fundamentals Part 2. The certification is awarded upon successfully passing two open book exams that consists of 75 multiple choice and true/false questions.

## ***Item 3 - Disciplinary Information***

He has not been party to a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

## ***Item 4 - Other Business Activities***

He is not actively engaged in any other investment related business activities.

## ***Item 5 - Additional Compensation***

He does not receive any additional economic benefit from third parties for providing advisory services.

## ***Item 6 - Supervision***

John Lauer is responsible for supervising Mr. Mehalovich. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Mr. Mehalovich provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.

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SCHEDULE 2B - BROCHURE SUPPLEMENT

**Jason B. Vande Brake**

March 5, 2015

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**This Brochure Supplement provides information about Jason B. Vande Brake that supplements the Northwest Wealth Management, LLC (“NWM”) brochure. You should have received a copy of that brochure. Please contact John Lauer if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Jason B. Vande Brake (CRD No. 5377918) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

***Item 2 - Educational Background and Business Experience***

Mr. Vande Brake was born in 1977. He graduated from Drake University, Des Moines, Iowa with a bachelor's degree in Education.

From June 2001 until July 2007 he worked for the Iowa Lakes Community College as the Athletic Director and Housing Director of the Estherville, Iowa campus. He also served as the Men's Basketball Coach. In 2007 he joined Edward D. Jones as an Financial Advisor, where he worked as a securities agent and investment adviser representative until October 2012. He joined NWM as an Investment Adviser Representative in 2012.

He has successfully passed the FINRA Series 7 General Securities Representative Exam and Series 66 Uniform Combined State Law Exam.

***Item 3 - Disciplinary Information***

He has not been party to a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

***Item 4 - Other Business Activities***

He is not actively engaged in any other investment related business activities.

***Item 5 - Additional Compensation***

He does not receive any additional economic benefit from third parties for providing advisory services.

***Item 6 - Supervision***

John Lauer is responsible for supervising Mr. Vande Brake. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Mr. Vande Brake provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.

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**SCHEDULE 2B - BROCHURE SUPPLEMENT**

**Ryan D. Hervey**

March 5, 2015

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**This Brochure Supplement provides information about Ryan D. Hervey that supplements the Northwest Wealth Management, LLC (“NWM”) brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Ryan D. Hervey (CRD No. 5205485) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

## ***Item 2 - Educational Background and Business Experience***

Mr. Hervey was born in 1977. He graduated from Simpson College in 2001 with a Bachelor of Arts in History and Political Science and Drake University in 2004 with a Juris Doctorate.

From 2004 until 2006 he worked as an Associate with Pearson Van Houten, PLC, from 2006 to 2008 with Farm Bureau Financial Services as a Senior Life Sales Consultant and 2008 until 2013 with AVIVA USA as a Senior Consultant Advanced Markets. He joined NWM as an Investment Adviser Representative in 2013.

He has also successfully passed the FINRA Series 6 Investment Company Products/Variable Contracts Representative Exam, Series 26 Investment Company Products/Variable Contracts Principal Exam and Series 63 Uniform Securities Agent State Law Exam.

## ***Item 3 - Disciplinary Information***

He has not been party to a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

## ***Item 4 - Other Business Activities***

He is not actively engaged in any other investment related business activities.

## ***Item 5 - Additional Compensation***

He does not receive any additional economic benefit from third parties for providing advisory services.

## ***Item 6 - Supervision***

John Lauer is responsible for supervising Mr. Hervey. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Mr. Hervey provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.

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**SCHEDULE 2B - BROCHURE SUPPLEMENT**

**Nicole Evans**

March 5, 2015

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**This Brochure Supplement provides information about Nicole Evans that supplements the Northwest Wealth Management, LLC (“NWM”) brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Nicole Evans (CRD No. 6255480) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

***Item 2 - Educational Background and Business Experience***

Ms. Evans was born in 1984. She graduated from Buena Vista University in Storm Lake, Iowa in 2005 with a Bachelor of Arts Cum Laude with Finance and Banking major.

From December 2005 until May 2008 she was a Phone Banker with Wells Fargo. From May 2008 until April 2012 she was a Personal Banker with Liberty Bank. In 2012 she joined Northwest Bank as a Personal Banker and in September 2013 joined NWM as a Personal Banking Specialist.

She has successfully passed the Series 65 Uniform Investment Adviser Law Exam.

***Item 3 - Disciplinary Information***

She has not been party to a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

***Item 4 - Other Business Activities***

She is also an employee of Northwest Bank, but is not otherwise actively engaged in any other investment related business activities.

***Item 5 - Additional Compensation***

She receives compensation through her employment with Northwest Bank but does not receive any additional economic benefit from third parties for providing advisory services.

***Item 6 - Supervision***

John Lauer is responsible for supervising Ms. Evans. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Ms. Evans provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.



***Item 1 - Cover Page***

**SCHEDULE 2B - BROCHURE SUPPLEMENT**

**Anne M. Vedder**

March 5, 2015

**NORTHWEST WEALTH MANAGEMENT, LLC**

705 N. Grand Ave.

Spencer, IA 51301

Phone (712) 580-4100 Fax (712) 580-4188

1 North 6th Street

Estherville, IA 51334

[www.invest-northwest.com](http://www.invest-northwest.com)

**This Brochure Supplement provides information about Anne Vedder that supplements the Northwest Wealth Management, LLC (“NWM”) brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Anne M. Vedder (CRD No. 6255468) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

***Item 2 - Educational Background and Business Experience***

Ms. Vedder was born in 1972. She attended Iowa Lakes Community College and received an Associates of Arts degree.

From August 1997 until September 2011 she was a Banking Center Assistant Manager and then from September 2011 until September 2012 a Banking Center Manager for Bank of America. She joined Northwest Bank in September 2012 as a Personal Banker and NWM as a Personal Banking Specialist in September 2013.

She has successfully passed the Series 65 Uniform Investment Adviser Law Exam.

***Item 3 - Disciplinary Information***

She has not been party to a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

***Item 4 - Other Business Activities***

She is also an employee of Northwest Bank, but is not otherwise actively engaged in any other investment related business activities. She is also the President elect of the local Noon Kiwanis Club.

***Item 5 - Additional Compensation***

She receives compensation through her employment with Northwest Bank but does not receive any additional economic benefit from third parties for providing advisory services.

***Item 6 - Supervision***

John Lauer is responsible for supervising Ms. Vedder. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Ms. Vedder provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.

SCHEDULE 2B - BROCHURE SUPPLEMENT

**Jeffrey D. Ploeger**

March 5, 2015

NORTHWEST WEALTH MANAGEMENT, LLC

705 N. Grand Ave.

Spencer, IA 51301

Phone (712) 580-4100 Fax (712) 580-4188

46 N. Hwy 71

Arnolds Park, IA 51331

[www.invest-northwest.com](http://www.invest-northwest.com)

**This Brochure Supplement provides information about Jeffrey D. Ploeger that supplements the Northwest Wealth Management, LLC ("NWM") brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Jeff Ploeger (CRD No. 4177845) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

***Item 2 - Educational Background and Business Experience***

Mr. Ploeger was born in 1960. He graduated from Denison Community High School in 1978.

His recent employment history includes acting as the President of Jaspers Family Rest, Inc. from April 1988 until April 2000. In April 2000 he joined Edward Jones where he was an Investment Representative until November 2013 when he joined Northwest Wealth Management, LLC as an Investment Adviser Representative.

He has successfully passed the FINRA Series 7 General Securities Representative Exam, Series 63 Uniform Securities Agent Law Exam and the Series 66 Uniform Combined State Law Exam.

***Item 3 - Disciplinary Information***

He has not been party to a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

***Item 4 - Other Business Activities***

He is also an employee of Northwest Bank, but is not otherwise actively engaged in any other investment related business activities.

***Item 5 - Additional Compensation***

He may receive compensation through his employment with Northwest Bank but does not receive any additional economic benefit from third parties for providing advisory services.

***Item 6 - Supervision***

John Lauer is responsible for supervising Mr. Ploeger. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Mr. Ploeger provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.

SCHEDULE 2B - BROCHURE SUPPLEMENT

**Jody Stoll**

March 5, 2015

NORTHWEST WEALTH MANAGEMENT, LLC

705 N. Grand Ave.

Spencer, IA 51301

Phone (712) 580-4100 Fax (712) 580-4188

1802 Okoboji Avenue

Milford, IA 51351

[www.invest-northwest.com](http://www.invest-northwest.com)

**This Brochure Supplement provides information about Jody Stoll that supplements the Northwest Wealth Management, LLC (“NWM”) brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Jody Stoll (CRD No. 5825170) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

***Item 2 - Educational Background and Business Experience***

Ms. Stoll was born in 1976. She graduated from Atlantic High School in 1994. She graduated Summa Cum Laude from Bellevue University in 2001 with a Bachelors of Science in Management.

Her recent employment history includes acting as a Registered Representative for VSR Financial Services, Inc. from July 2010 through August 2012 and a Branch Manager of Liberty Bank from October 2006 until August 2012. She joined Northwest Bank as a retail manager in April of 2012 and NWM in 2013, she became an investment adviser representative in January 2014.

She has successfully passed the FINRA Series 7 General Securities Representative Exam, Series 63 Uniform Securities Agent Law Exam and the Series 65 Uniform Investment Adviser State Law Exam. She also holds her Life insurance license.

***Item 3 - Disciplinary Information***

She has not been party to a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

***Item 4 - Other Business Activities***

She is not actively engaged in any other investment related business activities.

***Item 5 - Additional Compensation***

She does not receive any additional economic benefit from third parties for providing advisory services.

***Item 6 - Supervision***

John Lauer is responsible for supervising Ms. Stoll. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Ms. Stoll provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.

SCHEDULE 2B - BROCHURE SUPPLEMENT

**Kevin Frette**

March 5, 2015

NORTHWEST WEALTH MANAGEMENT, LLC

705 N. Grand Ave.

Spencer, IA 51301

Phone (712) 580-4100 Fax (712) 580-4188

[www.invest-northwest.com](http://www.invest-northwest.com)

**This Brochure Supplement provides information about Kevin Frette that supplements the Northwest Wealth Management, LLC ("NWM") brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Kevin Frette (CRD No. 5904204) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

***Item 2 - Educational Background and Business Experience***

Mr. Frette was born in 1972. He graduated from Iowa State University in 1996 with a degree in Finance and a minor in International Studies.

He joined NWM as a Wealth Advisor in June 2014. He has 19 years of prior financial service experience which includes being a Financial Advisor with Edward Jones and Private Banking Officer for US Bank. He is also a past graduate of the Greater Des Moines Leadership Institute.

He has successfully passed the FINRA Series 7 General Securities Representative Exam and Series 66 Uniform Combined State Law Exam.

***Item 3 - Disciplinary Information***

He has not been party to a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

***Item 4 - Other Business Activities***

He is not actively engaged in any other investment related business activities.

***Item 5 - Additional Compensation***

He does not receive any additional economic benefit from third parties for providing advisory services.

***Item 6 - Supervision***

John Lauer is responsible for supervising Mr. Frette. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Mr. Frette provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.



SCHEDULE 2B - BROCHURE SUPPLEMENT

**James Shoquist**

March 5, 2015

NORTHWEST WEALTH MANAGEMENT, LLC

705 N. Grand Ave.

Spencer, IA 51301

Phone (712) 580-4100 Fax (712) 580-4188

[www.invest-northwest.com](http://www.invest-northwest.com)

**This Brochure Supplement provides information about James Shoquist that supplements the Northwest Wealth Management, LLC ("NWM") brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about James Shoquist (CRD No. 5612546) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

***Item 2 - Educational Background and Business Experience***

Mr. Shoquist was born in 1981. He was raised in Southwest Wisconsin. He joined the United States Air Force in 1999, serving honorably until 2005. After his services in the Air Force, he earned a Bachelor's degree from the University of Nebraska-Omaha in 2007. Upon graduation he entered the financial services industry as a Financial Advisor with Wells Fargo from 2007 until 2014. In May 2014 he joined NWM as a Financial Advisor.

He has successfully passed the FINRA Series 7 General Securities Representative Exam and Series 66 Uniform Combined State Law Exam.

***Item 3 - Disciplinary Information***

He has not been party to a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

***Item 4 - Other Business Activities***

He is not actively engaged in any other investment related business activities.

***Item 5 - Additional Compensation***

He does not receive any additional economic benefit from third parties for providing advisory services.

***Item 6 - Supervision***

John Lauer is responsible for supervising Mr. Shoquist. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Mr. Shoquist provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.

SCHEDULE 2B - BROCHURE SUPPLEMENT

**Brent J. Bonner**

March 5, 2015

NORTHWEST WEALTH MANAGEMENT, LLC

705 N. Grand Ave.

Spencer, IA 51301

Phone (712) 580-4100 Fax (712) 580-4188

730 Lake Avenue

Storm Lake, IA 50126

[www.invest-northwest.com](http://www.invest-northwest.com)

**This Brochure Supplement provides information about Brent Bonner that supplements the Northwest Wealth Management, LLC (“NWM”) brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Brent Bonner (CRD No. 6145736) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

***Item 2 - Educational Background and Business Experience***

Mr. Bonner was born in 1977. He graduated from Iowa State University with a Bachelors of Science in 2001. He started with Iowa Falls State Bank in 2002 as a Lender and became a Registered Representative in 2012. From there he went to Cetera Investment Services LLC as a Registered Representative from 2012 to 2014, and Cetera Investment Advisers, LLC as an Investment Adviser Representative from 2012 to 2014. In 2014 he joined NWM as Market President.

He has successfully passed the FINRA Series 7 General Securities Representative Exam and Series 66 Uniform Combined State Law Exam.

***Item 3 - Disciplinary Information***

He has not been party to a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

***Item 4 - Other Business Activities***

He is not actively engaged in any other investment related business activities.

***Item 5 - Additional Compensation***

He does not receive any additional economic benefit from third parties for providing advisory services.

***Item 6 - Supervision***

John Lauer is responsible for supervising Mr. Bonner. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Mr. Bonner provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.

SCHEDULE 2B - BROCHURE SUPPLEMENT

**Dean M. Jacobsen**

March 5, 2015

NORTHWEST WEALTH MANAGEMENT, LLC

705 N. Grand Ave.

Spencer, IA 51301

Phone (712) 580-4100 Fax (712) 580-4188

[www.invest-northwest.com](http://www.invest-northwest.com)

**This Brochure Supplement provides information about Dean M. Jacobsen that supplements the Northwest Wealth Management, LLC (“NWM”) brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Dean M. Jacobsen (CRD No. 6429693) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

***Item 2 - Educational Background and Business Experience***

Mr. Jacobsen was born in 1960. He graduated with a Bachelor of Science Degree in Business Administration from Dakota State College. Since July 2000 he has worked with Northwest Bank, he is currently a branch manager. He joined NWA in December 2014.

He has successfully passed the Series 65 Uniform Investment Advisor State Law Exam.

***Item 3 - Disciplinary Information***

He has not been party to: (a) a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

***Item 4 - Other Business Activities***

He is not actively engaged in any other investment related business activities.

***Item 5 - Additional Compensation***

He does not receive any additional economic benefit from third parties for providing advisory services.

***Item 6 - Supervision***

John Lauer is responsible for supervising Mr. Jacobsen. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Mr. Jacobsen provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.

SCHEDULE 2B - BROCHURE SUPPLEMENT

**Linda M. Heim**

March 5, 2015

NORTHWEST WEALTH MANAGEMENT, LLC

705 N. Grand Ave.

Spencer, IA 51301

Phone (712) 580-4100 Fax (712) 580-4188

1700 SE Delaware Ave.

Ankeny, IA 50021

[www.invest-northwest.com](http://www.invest-northwest.com)

**This Brochure Supplement provides information about Linda Heim that supplements the Northwest Wealth Management, LLC (“NWM”) brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Linda Heim (CRD No. 6437425) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

***Item 2 - Educational Background and Business Experience***

Ms. Heim was born in 1961. She attended Raymond Walters College studying court reporting. She has been a Personal Banker with Northwest Bank since 2004. She joined Northwest Wealth Management, LLC in January 2015 and became registered in March.

She has successfully passed the Series 65 Uniform Investment Advisor State Law Exam.

***Item 3 - Disciplinary Information***

She has not been party to: (a) a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

***Item 4 - Other Business Activities***

She is not actively engaged in any other investment related business activities.

***Item 5 - Additional Compensation***

She does not receive any additional economic benefit from third parties for providing advisory services.

***Item 6 - Supervision***

John Lauer is responsible for supervising Ms. Heim. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Ms. Heim provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.



SCHEDULE 2B - BROCHURE SUPPLEMENT

**Andrea A. Stone**

March 5, 2015

NORTHWEST WEALTH MANAGEMENT, LLC

705 N. Grand Ave.

Spencer, IA 51301

Phone (712) 580-4100 Fax (712) 580-4188

14320 Arbor St.

Omaha, NE 68144

[www.invest-northwest.com](http://www.invest-northwest.com)

**This Brochure Supplement provides information about Andrea Stone that supplements the Northwest Wealth Management, LLC (“NWM”) brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Andrea A. Stone (CRD No. 6437412) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

***Item 2 - Educational Background and Business Experience***

Ms. Stone was born in 1970. She graduated from Kansas State University with a Bachelors Degree in Hotel and Restaurant Management. She has been with Northwest Bank since 2004 and is currently a Retail Banking Executive. She joined Northwest Wealth Management, LLC in January 2015 and became registered in March.

She has successfully passed the Series 65 Uniform Investment Advisor State Law Exam.

***Item 3 - Disciplinary Information***

She has not been party to: (a) a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

***Item 4 - Other Business Activities***

She is not actively engaged in any other investment related business activities.

***Item 5 - Additional Compensation***

She does not receive any additional economic benefit from third parties for providing advisory services.

***Item 6 - Supervision***

John Lauer is responsible for supervising Ms. Stone. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Ms. Stone provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.

SCHEDULE 2B - BROCHURE SUPPLEMENT

**Julie M. Clendenen**

March 5, 2015

NORTHWEST WEALTH MANAGEMENT, LLC

705 N. Grand Ave.

Spencer, IA 51301

Phone (712) 580-4100 Fax (712) 580-4188

[www.invest-northwest.com](http://www.invest-northwest.com)

**This Brochure Supplement provides information about Julie Clendenen that supplements the Northwest Wealth Management, LLC (“NWM”) brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Julie M. Clendenen (CRD No. 6437390) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

***Item 2 - Educational Background and Business Experience***

Ms. Clendenen was born in 1972. She graduated from Iowa Central Community College with an Associates Degree and graduated from Buena Vista University with a Bachelors Degree in Psychology/Human Services. She worked as a Real Estate Agent from August 1998 until July 2006. From July 2006 until November 2006 she was a Personal Banker with Wells Fargo. She has been with Northwest Bank as a Retail Manager since November 2006. She joined Northwest Wealth Management, LLC in January 2015 and became registered in March.

She has successfully passed the Series 65 Uniform Investment Advisor State Law Exam.

***Item 3 - Disciplinary Information***

She has not been party to: (a) a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

***Item 4 - Other Business Activities***

She is not actively engaged in any other investment related business activities.

***Item 5 - Additional Compensation***

She does not receive any additional economic benefit from third parties for providing advisory services.

***Item 6 - Supervision***

John Lauer is responsible for supervising Ms. Clendenen. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which she provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.

SCHEDULE 2B - BROCHURE SUPPLEMENT

**Danielle M. Doran**

March 5, 2015

NORTHWEST WEALTH MANAGEMENT, LLC

705 N. Grand Ave.

Spencer, IA 51301

Phone (712) 580-4100 Fax (712) 580-4188

[www.invest-northwest.com](http://www.invest-northwest.com)

**This Brochure Supplement provides information about Danielle Doran that supplements the Northwest Wealth Management, LLC (“NWM”) brochure. You should have received a copy of that brochure. Please contact us at (712) 580-4100 if you did not receive NWM's brochure or if you have any questions about the contents of this supplement.**

**Additional information about Danielle M. Doran (CRD No. 6437382) is available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).**

***Item 2 - Educational Background and Business Experience***

Ms. Doran was born in 1986. She earned an Associates Degree from Iowa Lakes Community College and then a Bachelors Degree in Business Management from Buena Vista University. She worked as a Waitress at Family Table from January 2005 until August 2006. From August 2006 until June 2008 she was an Assistant Operator with RR Donnelley. In June 2008 she started with Northwest Bank and is currently a Customer Service Representative. She joined Northwest Wealth Management, LLC in January 2015 and became registered in March.

She has successfully passed the Series 65 Uniform Investment Advisor State Law Exam.

***Item 3 - Disciplinary Information***

She has not been party to: (a) a criminal or civil action in a domestic, foreign or military court, (b) been party to an administrative proceeding before the SEC, any other federal regulatory agency, any state regulatory agency or any foreign financial regulatory authority; or (c) been party to a self-regulatory proceeding.

***Item 4 - Other Business Activities***

She is not actively engaged in any other investment related business activities.

***Item 5 - Additional Compensation***

She does not receive any additional economic benefit from third parties for providing advisory services.

***Item 6 - Supervision***

John Lauer is responsible for supervising Ms. Doran. He may be contacted at (712) 580-4100.

Mr. Lauer and other individuals as he designates, regularly review the accounts for which Ms. Doran provides investment advisory services to monitor suitability of recommendations and compliance with regulatory and internal procedures.