KANE COMPANY

Certified Public Accountants and Financial Advisors

A PROFESSIONAL CORPORATION
A FEE-ONLY REGISTERED INVESTMENT ADVISOR

Wealth Management

KANE COMPANY

AT A GLANCE

Kane Company Wealth Management offers a comprehensive approach to providing professional financial and tax advice. Our Certified Financial Planner™ professionals, Certified Public Accountants, and Personal Financial Specialists can help you develop and implement a long-term strategy that meets your financial goals.

FOUNDED

1993

SERVING

- HIGH NET WORTH INVESTORS
- WEALTH ACCUMULATORS
- PRE-RETIREES AND YOUNG PROFESSIONALS
- BUSINESS EXECUTIVES
- BUSINESS OWNERS
- LIVELY RETIREES

OUR TEAM

- STEVEN L. KANE, CPA/PFS, CFP®
- SARAH L. ZIMMERMAN, CPA/PFS
- JASON J. KANE, CFP®
- ELIZABETH A. BUCKLEY, CPA
- SUSAN K. MCKEE

LOCATIONS

- JOHNSTON, IOWA
- SERVING CLIENTS NATIONWIDE

ASSETS UNDER MGMT

$175 MILLION

AS OF APRIL 30, 2023

SOCIAL MEDIA

- KANECOWEALTH
- @KANECOWEALTH
- KANE COMPANY WEALTH MANAGEMENT, PC

Disclosure: Investment advisory services provided by Kane Company Wealth Management, an SEC registered investment advisory firm. All investing involves risk, including loss of principal. There is no guarantee that any investment plan or strategy will be successful. Please see additional disclosures at: https://adviserinfo.sec.gov/firm/summary/115756

SERVICES

- COMPREHENSIVE WEALTH MANAGEMENT
- INVESTMENT MANAGEMENT
- INCOME TAX PLANNING AND PREPARATION
- FINANCIAL PLANNING
- RETIREMENT PLANNING AND ROADMAP
- ESTATE PLANNING
- COLLEGE PLANNING
- PROACTIVE AGING AND MIDDLESENCE PLANNING
- CHARITABLE AND LEGACY PLANNING
- SOCIAL SECURITY PLANNING

KEY QUALITIES

WE ARE:
An independent, low cost, fee-only fiduciary wealth management firm offering a comprehensive and tailored approach designed to meet your specific goals.

YOUR CLIENT EXPERIENCE:
We help our clients identify and achieve their greatest personal goals by offering informed, objective, and far-reaching financial advice.

YOUR INVESTMENTS ARE:
Low-cost, globally diversified, evidence-based.

CONNECT WITH US

KEY ALLIANCES

FUND MANAGERS

Our select fund manager alliances help us consistently apply your ideal investment strategy.

Dimensional

Avantis Investors®

YOUR MONEY IS HELD AT

Your assets are held independently, with transparent transaction reports sent directly to you.

CHARLES SCHWAB

TIAA

ALSO AFFILIATED WITH

Additional professional affiliations ensure we gain from, and contribute to best financial advisory practices: advancing transparent, low-cost, strictly fiduciary levels of client care.

CFP® CERTIFIED FINANCIAL PLANNER™

FPA FINANCIAL PLANNING ASSOCIATION

NAPFA THE NATIONAL ASSOCIATION OF PERSONAL FINANCIAL ADVISORS

FPA OF IOWA FINANCIAL PLANNING ASSOCIATION

ISCPA IOWA SOCIETY OF CPAs

COMMUNITY FOUNDATION GREATER DES MOINES

AICPA Member

CPA PFS Personal Financial Specialist

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