KANE COMPANY
Certified Public Accountants and Financial Advisors
A PROFESSIONAL CORPORATION
A FEE-ONLY REGISTERED INVESTMENT ADVISOR

Wealth Management KANE COMPANY

FOUNDED

1993

SERVING

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

OUR TEAM

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

LOCATIONS

JOHNSTON, IOWA
SERVING CLIENTS NATIONWIDE

ASSETS UNDER MGMT

$210 MILLION
AS OF JUNE 30, 2024

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

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.

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
ROTH IRA CONVERSION ANALYSIS

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, and tax efficient.

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

Altruist

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 FINANCIAL PLANNING ASSOCIATION OF IOWA

iscpa IOWA SOCIETY OF CPAs

COMMUNITY FOUNDATION GREATER DES MOINES

AICPA Member

CPA PFS Personal Financial Specialist

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