



# CREATIVE PORTFOLIO

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Insurance Agency Marketing Services  
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Insurance  
Agency  
Marketing  
Services, Inc.

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# INTRODUCTION

Here at IAMS, everything we do is completed at a high standard with the producer in mind; our Creative Department is one example of this excellence. Our team of marketing professionals work on the frontline of your branding efforts as they work alongside your sales directors to maximize your production opportunities.

We provide the same level of service as an independent advertising firm to our agents. From print to digital, our Creative Team is able to assist with all your marketing needs. They constantly put their best foot forward to ensure your branding campaign achieves desired results and positions your business for future growth.

# CREATIVE TEAM



**JACOB TEDLOCK**  
DIGITAL COMMUNICATIONS  
DIRECTOR



**SEAN CRAWFORD**  
GRAPHIC DESIGNER



# AGENT WORK

Your brand identity is the foundation of your marketing efforts. Because of that, we pay close attention to help develop your dream. Business cards, informational client-facing documents, websites and much more all begin with your brand. Our marketing experts craft materials you can utilize in all aspects of your advertising efforts, on and offline. The only limit to what we can do for you is your own imagination.



THE **JONES** AGENCY



**ROEWERT**  
PLANNING

**LVA** | **LANDIS**  
VALLEY ADVISORS



**ESTATE PLANNING**  
S T R A T E G I E S



**TIMOTHY DeMAY**  
FINANCIAL SOLUTIONS



**WILKINS FINANCIAL**



**CARMO**  
ANNUITY & TRUST



**FUNK FINANCIAL**  
RETIREMENT SERVICES



**WESTERN PLAINS** ADVISORS



**Dvorak**  
WEALTH MANAGEMENT



**DMP INSURANCE SERVICES**



## TIMOTHY DeMAY FINANCIAL SERVICES

An advisor under our Wealth Management branch, Tim recieved a complete brand revitalization; complete with logo, business cards, and informational documents as well as a personal website.



# The Benefits of Working With an Investment Advisor

**What We Deliver as an Investment Advisor**  
Whether we are helping you plan for your retirement or save for your child's education, YOUR objectives are OUR objectives:

- As an Investment Advisor, it is our fiduciary responsibility to act in your best interest—we are legally bound to put our clients' interests first
- We will take the time to understand you and your specific financial situation
- We will strive to ensure your needs are being met through a personal relationship and committed pursuit of your investment goals
- We will make portfolio recommendations consistent with your objectives

**Personalized, Focused Financial Advice**  
Our compensation for asset management services is aligned with your goals:

- We charge for our services based on a percentage of your assets managed—it is important to us that your investments continue to grow
- Where a commission may be involved, we will disclose how we are compensated so you can give consent on those financial products

**CONTACT US**  
Timothy DeMay  
1234 Street Rd.  
City, ST 12345  
(555) 555-5555  
firstlast@email.com

**Should Ask Yourself:**

- What am I looking for - Assistance with buying/selling individual securities, investment advice, or both?
- How do I want to pay my financial professional? Fees? Commissions?
- Do I want to take a longer-term, holistic approach to management of my investments or make it more transaction oriented?
- How important is it that my financial professional have a fiduciary responsibility to put my interests first?

**TIMOTHY DeMAY**  
FINANCIAL SOLUTIONS

**by Financial Solutions Annual Profile Net Returns**

2	Profile 3	Profile 4	Profile 5	Profile 6	Profile 7	Profile 8	Profile 9	Profile 10
6.4%	6.9%	7.4%	8.0%	8.5%	9.0%	9.6%	10.1%	
6.2%	6.1%	6.1%	6.1%	6.0%	6.0%	6.0%	6.0%	
15.4%	18.0%	20.5%	23.1%	25.6%	28.2%	30.7%	33.3%	
6.6%	6.5%	6.4%	6.4%	6.3%	6.2%	6.1%	6.0%	
12.5%	11.7%	10.9%	10.1%	9.3%	8.4%	7.6%	6.8%	
6.2%	7.0%	7.7%	8.5%	9.2%	10.0%	10.7%	11.5%	
6.7%	10.7%	14.6%	18.6%	22.5%	26.5%	30.4%	34.4%	
7.4%	7.9%	8.4%	9.0%	9.5%	10.0%	10.5%	11.0%	
-1.1%	-0.6%	-0.2%	0.3%	0.8%	1.2%	1.7%	2.1%	
7.7%	8.1%	8.6%	9.0%	9.4%	9.8%	10.3%	10.7%	
6.5%	8.3%	10.2%	12.1%	13.9%	15.8%	17.6%	19.5%	
<b>7.3%</b>	<b>8.2%</b>	<b>9.2%</b>	<b>10.1%</b>	<b>11.0%</b>	<b>11.9%</b>	<b>12.8%</b>	<b>13.8%</b>	

ALL RETURNS ARE DERIVED USING BACKCASTING ANALYSIS. ALL RETURNS ARE SHOWN NET OF A 1.0% MANAGEMENT FEE.  
© 2015 Wealth Management, Timothy DeMay Financial Solutions and DMI Wealth Management are independent of each other and do not have any relationship with the SEC and only conduct business in states where it is properly registered or is exempt from registration. The firm by the Commission and does not make the advisor has achieved a specific level of skill or ability.  
From 12/31/2007 to 12/31/2017, all results reflected the periods ending 12/31/2017. The Timothy DeMay Financial Services was founded on September 1, 2008. All investments have the potential for profit or loss. Different types of investments involve higher and lower levels of risk. There is no guarantee that a specific investment or strategy will be suitable or profitable for an investor's portfolio. There are no guarantees that a portfolio will match or outperform a specific benchmark. Asset allocation and diversification will not necessarily improve an investor's returns and cannot eliminate the risk of investment losses.





# THE JONES AGENCY



## THE JONES AGENCY

A Medicare focused firm approached our team needing to develop their digital identity. Starting with a rebrand, the Jones Agency now has a website, Facebook presence and has begun digital advertising campaigns.





**Dvorak**  
WEALTH MANAGEMENT

## 2018 Income Tax Rate Schedule

**If Taxable Income Is:**

Over	But Not Over	The Tax Is
<b>Married Filing Jointly</b>		
\$0	\$19,050	10%
\$19,050	\$77,400	12%
\$77,400	\$165,000	22%
\$165,000	\$315,000	24%
\$315,000	\$400,000	32%
\$400,000	\$600,000	35%
\$600,000	And Over	37%

Single		
\$0	\$9,525	10%
\$9,525	\$38,700	12%
\$38,700	\$82,500	22%
\$82,500	\$157,500	24%
\$157,500	\$200,000	32%
\$200,000	\$500,000	35%
\$500,000	And Over	37%

**Married Filing Separate**

Married Filing Separate		
\$0	\$9,525	10%
\$9,525	\$38,700	12%
\$38,700	\$82,500	22%
\$82,500	\$157,500	24%
\$157,500	\$200,000	32%
\$200,000	\$300,000	35%
\$300,000	And Over	37%

Head of Household		
\$0	\$13,600	10%
\$13,600	\$51,800	12%
\$51,800	\$82,500	22%
\$82,500	\$157,500	24%
\$157,500	\$200,000	32%
\$200,000	\$500,000	35%
\$500,000	And Over	37%

\$500,000	And Over	37%
<b>Estates and Trusts</b>		
\$0	\$2,550	10%
\$2,550	\$9,150	24%
\$9,150	\$12,500	35%
\$12,500	And Over	37%
<b>Corporate Tax Rate</b>		<b>21%</b>

## Standard Deductions

Married Filing Jointly	\$24,000
Single	\$12,000
Head of Household	\$18,000
Additional (age 65/older, or blind)	
Married Filing Jointly	\$1,250
Single, not surviving spouse	\$1,500
Child/Dependent Tax Credit	\$2,000
Qualifying Dependent	\$500
Mortgage Interest Deduction on acquisition indebtedness up to \$750,000 for 1st and 2nd homes	
State and Local Tax Deduction Limit	
State and local income and property tax deduction	\$10,000

Alternative Minimum Tax Exemption Report	
Married Joint	\$109,400
Single/Head of Household	\$70,300
Married Filing Separate	\$54,700

IRAs	
IRA Contribution - Under Age of 50	\$5,500
Age 50 or Older	\$6,500

<b>Phase-Out Range for Deductible IRA Contributions</b>	
Married Filing Jointly	\$101,000 - \$121,000
Single/Head of Household	\$63,000 - \$73,000
Married Filing Separately	\$0 - \$10,000
<b>Phase-Out Range for Deducting Spousal IRA</b>	
	\$189,000 - \$199,000

	\$189,000 - \$199,000
<b>Phase-Out Range for Roth Contributions Eligibility</b>	
Married Filing Jointly	\$189,000 - \$199,000
Single/Head of Household	\$120,000 - \$135,000
Married Filing Separately	\$0 - 10,000

## Gift an Estate Tax

Gift and annual exclusion	\$15,000
Estate and gift tax rate	40%
Estate tax exemption	\$11,200,000
Lifetime gift exemption	\$11,200,000
GST exemption	\$11,200,000
Annual exclusion for gifts to non-citizen spouse	\$152,000

Additional Medicare Tax Where Income Exceeds \$200,000 (\$250,000 Married Filing Jointly)	
Additional tax on excess of earned income <sup>1</sup>	0.9%
Additional tax on Net Investment Income <sup>2</sup>	3.8%

Health Care	
Eligible Long-Term Care	Deduction Limit
Age 40 or less	\$420
Age 41 to 50	\$780
Age 51 to 60	\$1,560
Age 61 to 70	\$4,160
Ages over 70	\$5,200
Per Diem Limitation for LTC Benefits	\$320

<b>Affordable Care Act :</b> Monthly penalty for failure to maintain minimum essential coverage: One-twelfth of greater of a flat dollar amount or a percentage of income.	\$695	2.5%
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1. Total Employee Medicare Tax is  $1.45\% + 0.9\% = 2.35\%$
2. Including interest, dividends, capital gains, and annuity distributions

[illegible]

Dvorak Wealth Management  
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## 2018 IAMS TAX FACTS

Our turn key solution library is constantly expanding. This example contains information regarding new tax regulations and can be branded for you as we did for Dvorak Wealth Mangement.

 Special Event  
FOR THERAPISTS

*Valentines Day Tr*  
hosted by  
Navarch Financial Services

# LUNCH & LEARN

**WEDNESDAY FEB 14TH**

12:30 PM – 1:45 PM  
HCR Manor Care  
Multi-Purpose Room

Come enjoy a FREE lunch  
and learn how we can help  
you secure your 401k

partnered with  
Curtis C. Turner Jr., Attorney & Counselor at Law  
1234 Street Blvd. | City, ST 12345



*Please join us for our Retirement Series*

*Retirement Education Series*  
*please join us for breakfast*

8:00AM AT THE EGG & I (70<sup>TH</sup> & A STREET)  
December 4th – Social Security  
December 18th – Medicare  
January 8th – Home or Facility Healthcare  
January 22nd – Your Estate, Probate, and Beneficiaries

**WHAT TO DO WITH YOUR 401(K)'S, ROLLOVERS,  
IRA'S, AND RMD'S?**  
February 8th, 5:30pm  
At Fireworks Restaurant: 84th & Old Cheney  
RSVP TO ANY OR ALL! 402-420-6633

& I (70<sup>TH</sup> & A STREET)  
Healthcare  
ate, and Beneficiaries  
(84<sup>TH</sup> & OLD CHENEY)  
A's, and RMD's  
20-6633

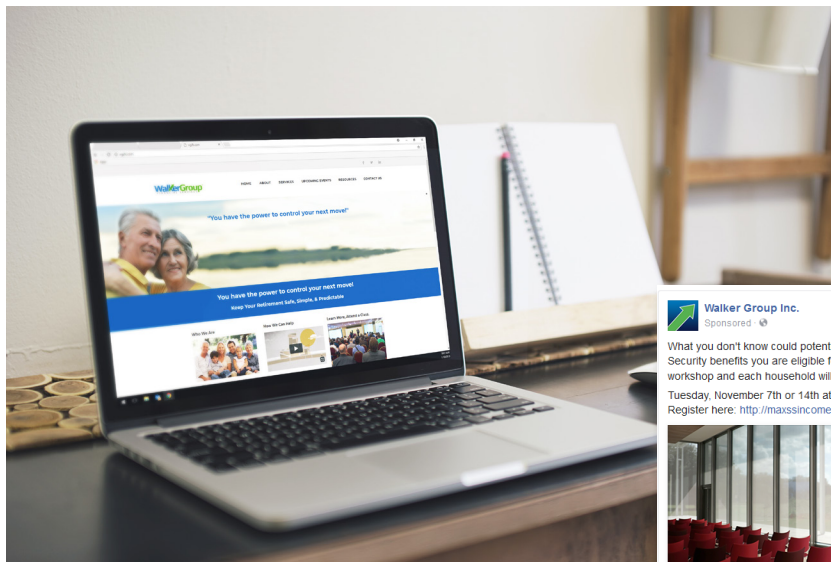
## EVENT MARKETING

Do you have a special event planned you need to promote? Our team can help you build an advertising campaign from mailers, to table toppers, to posters, flyers and digital advertising.

## LANDIS VALLEY ADVISORS

This campaign includes all new branding encompassing everything from logo design to digital and print pieces. Every piece was made from scratch including custom business reply envelopes to fit Landis Valley Advisors' needs for now and years to come.





## WALKER GROUP FINANCIAL SERVICES

Walker Group is one of our longest running clients. We continue to create Facebook and web ads for them as well as advertise upcoming and ongoing events with both print and digital media campaigns.

Insurance  
Agency  
Marketing  
Services, Inc.

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# CONTACT US

Connect with us and improve your marketing efforts. Find out how we can help you expand your business and grow your brand at [iamsinc.com/creative-solutions](https://iamsinc.com/creative-solutions) or call us at **800-255-5055**.

