



Independent Wealth Network

Item 1

Timothy Stoleson

Preferred Wealth Management, LLC.
1202 E. Maryland Ave, Suite 1J
Phoenix, AZ 85014
(602) 494-0020

Independent Wealth Network, Inc., 2350 NW 128th Street, Urbandale, IA 50323

(515) 461-5123

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This ADV Part 2B brochure provides information about **Timothy Stoleson** that supplements the Independent Wealth Network, Inc. ADV Part 2A brochure. You should have received a copy of that brochure. Please contact us at (515) 461-5123 or compliance@indwealth.net if you did not receive the Independent Wealth Network, Inc. brochure or if you have any questions about the content of this supplement.

Additional information about **Timothy Stoleson** is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2

Educational Background and Business Experience

Year of Birth: 1999

Formal Education beyond high school:

- Westmont College – Santa Barbara, CA – Business and Economics - 2021
- FINRA Exams Passed: Series 65
- Accident, Life, and Health Insurance Licensed

Business Background for the past 5 years:

- Preferred Wealth Management, LLC. –Administrative Assistant– 06/2024 to present, Investment Adviser Representative 03/2026 to present
- Independent Wealth Network, Inc. – Investment Adviser Representative – 03/2026 to present
- Preferred Group, LLC. – Administrative Assistant – 06/2024 to present, Insurance Agent - 03/2026 to present
- Zupancic Financial Group, LLC. – Administrative Assistant – 06/2024 to present
- Pro 10:22 1, 2, 3, - Owner - 06/2023 to present
- Unemployed – 06/2022 to 06/2023
- Legatum Limited – Analyst – 03/2022 to 05/2022
- Unemployed – 11/2021 to 03/2022
- Multiple Schools – Student – 08/2017 to 11/2021

Item 3

Disciplinary Actions

List any legal or disciplinary event, which occurred during the previous 10 years. **None**

Item 4

Other Business Activities

Other capacities in which you participate in investment-related business and the material conflicts of interest this presents:

Timothy assumed the role of Administrative Assistant for Preferred Wealth Management, LLC., Preferred Group, LLC., and Zupancic Financial on 06/2024. He is, also, a financial adviser, operating under the name of Preferred Wealth Management, LLC. as an Investment Adviser Representative for fee-based advisory relationships.

Timothy is a licensed insurance agent operating under the name Preferred Group, LLC., which provides insurance products and generate a sales commission.

Preferred Wealth Management, LLC., Preferred Financial Group, LLC., Preferred Group, LLC., Zupancic Financial Group, LLC., are not affiliated with Independent Wealth Network, Inc., but under common control.

Item 5 **Additional Compensation**

Any other activities if they involve more than 10% of your time or compensation.

Pro 10:22 1, Pro 10:22 2, and Pro 10:22 3 - Owner

Consistent with firm policies, Timothy may attend training events, due diligence meetings, and other events provided and paid for by the sponsors of mutual funds or other investment products, which he may recommend to clients. The receipt of this cash or non-cash compensation may create an incentive to recommend these investment products.

Investment Adviser Representatives are required to act in the best interest of the clients and are required to only recommend investment advisory programs, investment products and securities that are suitable for each client based upon the client's investment objectives, risk tolerance, and financial situation and needs.

Investment Adviser Representatives may also refer clients and prospective clients to a separate disclosure document that the client has or will receive that sets out a more detailed explanation of the material risks of investment strategies or methods of analysis that are or will be used to manage the client's account.

Item 6 **Supervision**

Clients complete an Investment Policy Statement (IPS) as part of their Investment Advisory Agreement which they acknowledge and sign. The Investment Adviser Representative (IAR) relies on this information when providing advice and services to the client. It is the client's responsibility to inform their IAR when their financial profile, goals, or objectives change.

The firm employs automated account supervision processes to identify potential variations from the clients' stated goals and objectives stated in the IPS.

The supervisor and compliance officer is Andrew Endelman, President & CCO (515) 461-5123