

This brochure supplement provides information about Logan Cole Queck that supplements the Total Wealth LLC brochure. You should have received a copy of that brochure. Please contact Logan Cole Queck if you did not receive Total WealthLLC's brochure or if you have any questions about the contents of this supplement.

Additional information about Logan Cole Queck is also available on the SEC's website at www.adviserinfo.sec.gov.

Total Wealth LLC

Form ADV Part 2B – Individual Disclosure Brochure

for

Logan Cole Queck

Personal CRD Number: 6618196

Investment Adviser Representative

Total Wealth LLC
5550 Wild Rose Ln Ste 400
West Des Moines, IA 50266
(515) 259-6369
hello@totalwealthdsm.com

UPDATED: 09/18/2023

Item 2: Educational Background and Business Experience

Name: Logan Cole Queck **Born:** 1987

Educational Background and Professional Designations:

Education:

Bachelor of Arts Business Management, Luther College - 2009

Designations:

CFP® - Certified Financial Planner ChFc® - Chartered Financial Consultant

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP (with flame design) marks (collectively, the “CFP® marks”) are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. (“CFP Board”).

The CFP® certification is a voluntary certification; 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.

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 its 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 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 the 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.

Individuals 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:

- i. 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
- ii. 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 interests 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.

Business Background:

09/2023 - Present	Managing Member Total Wealth, LLC
04/2019 - Present	Managing Member Total Wealth LLC
09/2016 – 04/2019	Investment Advisor Representative Royal Fund Management
08/0217 – 06/2020	Owner Integrity Risk Management
08/2015 - Present	Owner Iowa Retirement Planning, LLC
08/2015 - 12/2017	Owner Everything Insurance Solutions
05/2016 - 08/2016	Investment Advisor Representative Horter Investment Management
02/2016 - 04/2016	Investment Advisor Representative Royal Fund Management
03/2015 - 07/2015	Agent Millang Financial
09/2014 - 03/2015	Agent Basic Financial Solutions

08/2013 - 09/2014

Marketing Representative
American Retirement Systems

05/2012 - 08/2013

Field Tech
Barker Lemar Engineering Consultants

Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

Item 4: Other Business Activities

Logan Cole Queck is a licensed insurance agent. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Total Wealth LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to implement the plan through any representative of Total Wealth LLC in their capacity as a licensed insurance agent.

Item 5: Additional Compensation

Logan Cole Queck does not receive any economic benefit from any person, company, or organization, other than Total Wealth LLC in exchange for providing clients advisory services through Total Wealth LLC.

Item 6: Supervision

As the Chief Compliance Officer of Total Wealth LLC, Logan C Queck supervises all activities of the firm. Logan C. Queck contact information is on the cover page of this disclosure document. Logan C Queck adheres to applicable regulatory requirements, together with all policies and procedures outlined in the firm's code of ethics and compliance manual.

as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Logan C Queck is (515) 259-6369.

Item 7: Requirements For State Registered Advisers

This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.

- A. Logan Cole Queck has NOT been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.
 2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - a) an investment or an investment-related business or activity;
 - b) fraud, false statement(s), or omissions;
 - c) theft, embezzlement, or other wrongful taking of property;
 - d) bribery, forgery, counterfeiting, or extortion; or
 - e) dishonest, unfair, or unethical practices.
- B. Logan Cole Queck has NOT been the subject of a bankruptcy.