

Top row: Tim Hawkins, Aaron Robertson, Chris Harris
Bottom row: Brent Hawkins, Angie Rummel, Angie Zimmerman

Meet the Hawkins Team

At a glance

Year joined:
2022

AUM growth:
120% since joining[1]

AUM:
$1.008B[1]

Location:
North Liberty, Iowa

Net flow change, from first quarter to latest quarter:
219%[1]

About the team

His own boss from the start, Tim Hawkins launched into the financial industry in the early ’90s. After a brief stint in insurance, he became an advisor and opened his practice with a focus on retirement distribution planning. Eventually, he and his team expanded to form their own Registered Investment Advisor (RIA) in 2017, always with a profoundly solutions-based approach to client care.

“As time went along, we were trying to build, build, build, and we were growing very quickly,” Tim says. “But what we realized is that our client-facing time was diminishing. I became the de facto CEO because I had started the firm, but that was not something I wanted to do—it’s something that I had to do to help grow the firm. And so we started looking.”

After interviewing six firms, Tim and his team landed at Wealth Enhancement.

> “We wanted to find a partner that would *invest back in us*. We wanted to *maintain autonomy*. We still very much wanted to *grow*. We were very impressed with the Wealth Enhancement leadership team.”
>
> – Tim Hawkins, CFP®, Senior Vice President, Financial Advisor

Wealth Enhancement®

[1] As of 4/15/25. Advisory services offered through Wealth Enhancement Advisory Services, LLC, a registered investment advisor and affiliate of Wealth Enhancement Group®.

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Growth through partnership

Since joining Wealth Enhancement, the Hawkins Team has leveraged the capabilities of central services to continue to grow their practice–including a close with two entrepreneurs, each with more than $100 million in investable assets.

Tim had known the business partners for years, frequently golfing with them and sharing nuggets of financial planning wisdom. Building on the existing relationship, Tim continued to offer personalized support and invited them to meet with in-house specialists in investment management, private equity, tax planning, insurance, and estate planning. The team proposed vetted third-party solutions for advanced investment strategies.

"Once we had the opportunity to showcase our skillset at Wealth Enhancement, the deciding factor was just the depth of our bench and the resources that we could offer them," Tim says. "I'm convinced that, had we not had the Roundtable™ to draw real specialized insights, we probably never would have landed those clients."

Transitioning to a larger firm

The partnership with Wealth Enhancement has proven to be fruitful, though, some team members were wary.

"I come from a Fortune 500 background," says Chris Harris, Vice President, Financial Advisor. "I love the freedom and flexibility of an independent firm, and I was wondering what the corporate structure would be like. I was terrified."

Instead, he found a natural fit: "It was about a shared growth mindset, and also a culture of helping each other out. A rising tide lifts all boats–that mentality has been consistent."

Prior to the partnership, Chris had taken on the firm's marketing–a responsibility he's been able to shift to the central growth team. The Hawkins Team now has access to leads from various growth channels, including digital marketing, custodian referrals, and local events.

"To be the kind of company that is growing gives us energy and a continual drive," Chris says. "You can hook into that and just let that momentum carry you."

For Chris, one of the greatest benefits has been an increased ability to focus on his clients. "I've gained so much time back," he says. "Whether it's administrative issues or working through HR, Wealth Enhancement has taken it off us. With the freeing up of our time, we have the flexibility to chase–to go after opportunities that we didn't have the time for before."

Chris also notes opportunities for succession planning. "Wealth Enhancement wants to develop its next-generation leadership," he says. "For advisors nearing the end of their careers, the firm offers resources to successfully transition to that next generation."

Insight for partnering firms

According to Tim, there are two key factors for choosing Wealth Enhancement: "Firms that are looking to partner with Wealth Enhancement still should want to grow and still want to be part of their community. What Wealth Enhancement has to offer is significant–it's not just a place to remain idle."

Through internal communication channels, the Wealth Enhancement network of advisors can seek feedback on planning challenges and share industry resources.

"The collaboration is incredible," Tim says. "You just feel part of a larger community where everyone's rowing in the same direction."

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