Chamber Business Profile

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When clients walk into Experience Wealth in Oskaloosa, they often bring questions about retirement, savings, or financial uncertainty. Owner and financial advisor Josie Davis aims to make those conversations clearer, helping individuals and families leave with a plan and confidence in what comes next.

Experience Wealth, powered by Ameriprise Financial, moved its Oskaloosa office to 1205 A Ave. East in January 2024. While the location is new, both Experience Wealth and Ameriprise have a long-standing presence in the community. Longtime advisor Ken Seemann served Oskaloosa clients for 40 years, and Davis continues that legacy by serving the area today. The business provides financial planning, investment management, and banking solutions for individuals, families, and small business owners across the region.

Davis said the decision to grow the business in Oskaloosa was personal. “This area is home,” she said, noting that her family lives just north of town and has deep ties to Mahaska County. That connection shapes how she approaches her work, blending professional guidance with a genuine commitment to the local community.

Her path into financial planning began with a desire to simplify a complex subject. “Finances can be confusing and overwhelming for a lot of people,” Davis said. “I really wanted to make a difference and help people.” That motivation remains central to the business today.

While the Oskaloosa office is small, with Davis and client service administrator Krysta Spoelstra managing day-to-day operations, it is part of a broader Experience Wealth team with six offices across southeast and central Iowa. That network allows for collaboration and shared expertise, including access to professionals who specialize in accounting and estate planning.

“We take more of a holistic approach,” Davis said. By working alongside an accountant and an estate attorney within the team, clients can evaluate financial decisions from multiple angles—from tax implications to long-term planning.

That comprehensive approach, combined with a strong focus on client relationships and service, has earned the team a spot on Forbes' list of the best in-state wealth advisor teams for both 2025 and 2026. Davis said the recognition reflects the team’s commitment to delivering a high level of personalized care, consistent service, and guidance across all areas of their financial lives.

Services extend across all stages of life. The office assists with retirement planning, college savings, investment accounts, insurance protection, banking and cash management solutions, and financial strategies for major life events such as buying a home or starting a business. “I can help with all areas of life,” Davis said. For many clients, the value lies in clarity. Davis said people often appreciate having a space where they can ask questions and receive straightforward answers. “They walk out with a better understanding and answers to many of their questions,” she said.

The growth of the business has reinforced that approach. Rather than a single defining moment, Davis said confidence has built steadily through relationships. “It’s clients referring their family and friends and continuing to come back,” she said. Those referrals have become a key indicator that the work is making a meaningful impact.

Outside the office, Davis stays connected to the community through local organizations, including the Chamber of Commerce, Rotary, and school involvement with the North Mahaska PTO. Those connections reflect her belief that financial planning is not just about numbers, but about people and the communities they are a part of.

Her daily work reflects that focus. No two days are the same and often involve a mix of client meetings, plan development, and community outreach. Through it all, she aims to be accessible, even for those not yet ready to commit to a formal plan.

“I’m here as a resource,” Davis said. “Whether someone’s ready to work together or just has questions that need answered.”

As Experience Wealth continues to grow in Oskaloosa, the goal remains steady: to build relationships, provide clarity, and help clients feel more confident about their financial future. For Davis, success is measured not just in accounts managed, but in the trust built with families and businesses throughout the community.
