



IAPD Report

LAIF ERIK MEIDELL

CRD# 2627107

<u>Section Title</u>	<u>Page(s)</u>
Report Summary	1
Qualifications	2 - 5
Registration and Employment History	6 - 7
Disclosure Information	8



When communicating online or investing with any professional, make sure you know who you're dealing with. [Imposters](#) might link to sites like BrokerCheck from [phishing](#) or similar scam websites, or through [social media](#), trying to steal your personal information or your money.

Please contact FINRA with any concerns.



IAPD Information About Representatives

IAPD offers information on all current-and many former representatives. Investors are strongly encouraged to use IAPD to check the background of representatives before deciding to conduct, or continue to conduct, business with them.

What is included in a IAPD report?

IAPD reports for individual representatives include information such as employment history, professional qualifications, disciplinary actions, criminal convictions, civil judgments and arbitration awards.

It is important to note that the information contained in an IAPD report may include pending actions or allegations that may be contested, unresolved or unproven. In the end, these actions or allegations may be resolved in favor of the representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

Where did this information come from?

The information contained in IAPD comes from the Investment Adviser Registration Depository (IARD) and FINRA's Central Registration Depository, or CRD, (see more on CRD below) and is a combination of:

- information the states require representatives and firms to submit as part of the registration and licensing process, and
- information that state regulators report regarding disciplinary actions or allegations against representatives.

How current is this information?

Generally, representatives are required to update their professional and disciplinary information in IARD within 30 days.

Need help interpreting this report?

For help understanding how to read this report, please consult NASAA's IAPD Tips page <http://www.nasaa.org/IAPD/IARReports.cfm>

What if I want to check the background of an Individual Broker or Brokerage Firm?

To check the background of an Individual Broker or Brokerage firm, you can search for the firm or individual in IAPD. If your search is successful, click on the link provided to view the available licensing and registration information in FINRA's BrokerCheck website.

Are there other resources I can use to check the background of investment professionals?

It is recommended that you learn as much as possible about an individual representative or Investment Adviser firm before deciding to work with them. Your state securities regulator can help you research individuals and certain firms doing business in your state. The contact information for state securities regulators can be found on the website of the North American Securities Administrators Association <http://www.nasaa.org>



Report Summary

LAIF ERIK MEIDELL (CRD# 2627107)

The report summary provides an overview of the representative's professional background and conduct. The information contained in this report has been provided by the representative, investment adviser and/or securities firms, and/or securities regulators as part of the states' investment adviser registration and licensing process. The information contained in this report was last updated by the representative, a previous employing firm, or a securities regulator on **05/26/2026**.

CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
IA	AMERICAN WEALTH MANAGEMENT	CRD# 122205	09/04/2008
B	M. S. HOWELLS & CO.	CRD# 104100	08/24/2016

QUALIFICATIONS

This representative is currently registered in **2** SRO(s) and **17** jurisdiction(s).

Is this representative currently Inactive or Suspended with any regulator? **No**

Note: Not all jurisdictions require IAR registration or may have an exemption from registration.

Additional information including this individual's qualification examinations and professional designations is available in the Detailed Report.

REGISTRATION HISTORY

This representative was previously registered with the following firm(s):

	FIRM	CRD#	LOCATION	REGISTRATION DATES
B	FOOTHILL SECURITIES, INC.	1027	RENO, NV	03/01/2011 - 08/23/2016
B	LPL FINANCIAL LLC	6413	RENO, NV	09/08/2009 - 03/09/2011
IA	LPL FINANCIAL CORPORATION	6413	RENO, NV	09/25/2009 - 12/08/2009

For additional registration and employment history details as reported by the individual, refer to the Registration and Employment History section of the Detailed Report.

DISCLOSURE INFORMATION

Disclosure events include certain criminal charges and convictions, formal investigations and disciplinary actions initiated by regulators, customer disputes and arbitrations, and financial disclosures such as bankruptcies and unpaid judgments or liens.

Are there events disclosed about this representative? **Yes**

The following types of events are disclosed about this representative:

Type	Count
Customer Dispute	1



Qualifications

REGISTRATIONS

This section provides the SRO, states and U.S. territories in which the representative is currently registered and licensed, the category of each registration, and the date on which the registration becomes effective. This section also provides, for each firm with which the representative is currently employed, the address of each location where the representative works. This individual is currently registered with **17** jurisdiction(s) and 2 SRO(s) through his or her employer(s).

Employment 1 of 2

Firm Name: **M. S. HOWELLS & CO.**
Main Address: 23350 N. PIMA RD.
SCOTTSDALE, AZ 85255
Firm ID#: 104100

Regulator	Registration	Status	Date
B FINRA	General Securities Representative	Approved	08/24/2016
B Nasdaq Stock Market	General Securities Representative	Approved	08/24/2016
B Arizona	Agent	Approved	08/24/2016
B California	Agent	Approved	08/24/2016
B Colorado	Agent	Approved	08/24/2016
B Florida	Agent	Approved	08/24/2016
B Georgia	Agent	Approved	08/24/2016
B Idaho	Agent	Approved	08/24/2016
B Illinois	Agent	Approved	01/21/2022
B Michigan	Agent	Approved	08/24/2016
B Montana	Agent	Approved	08/24/2016
B Nevada	Agent	Approved	09/16/2016
B North Carolina	Agent	Approved	08/24/2016



Qualifications

Regulator	Registration	Status	Date
B Ohio	Agent	Approved	01/02/2020
B Oregon	Agent	Approved	03/14/2017
B Texas	Agent	Approved	08/24/2016
B Utah	Agent	Approved	08/24/2016
B Vermont	Agent	Approved	08/24/2016
B Washington	Agent	Approved	09/23/2016

Branch Office Locations

570 Hammill Lane
Reno, NV 89511

590 Hammill Ln.
Reno, NV 89511

Employment 2 of 2

Firm Name: **AMERICAN WEALTH MANAGEMENT**
 Main Address: 570 HAMMILL LANE
 RENO, NV 89511
 Firm ID#: 122205

Regulator	Registration	Status	Date
IA Arizona	Investment Adviser Representative	Approved	09/17/2009
IA California	Investment Adviser Representative	Approved	06/25/2009
IA Colorado	Investment Adviser Representative	Approved	04/08/2010
IA Nevada	Investment Adviser Representative	Approved	09/04/2008
IA Texas	Investment Adviser Representative	Restricted Approval	11/21/2011

Branch Office Locations

AMERICAN WEALTH MANAGEMENT



Qualifications

570 HAMMILL LANE
RENO, NV 89511



Qualifications

PASSED INDUSTRY EXAMS

This section includes all industry exams that the representative has passed. Under limited circumstances, a representative may attain registration after receiving an exam waiver based on a combination of exams the representative has passed and qualifying work experience. Likewise a new exam requirement may be grandfathered based on a representative's specific qualifying work experience. Exam waivers and grandfathering are not included below.

This individual has passed 0 principal/supervisory exams, 2 general industry/product exams, and 2 state securities law exams.

Principal/Supervisory Exams

Exam	Category	Date
------	----------	------

No information reported.

General Industry/Product Exams

Exam	Category	Date
------	----------	------

B Securities Industry Essentials Examination (SIE)	SIE	10/01/2018
---	-----	------------

B General Securities Representative Examination (S7)	Series 7	06/29/1995
---	----------	------------

State Securities Law Exams

Exam	Category	Date
------	----------	------

IA Uniform Investment Adviser Law Examination (S65)	Series 65	10/05/1995
--	-----------	------------

B Uniform Securities Agent State Law Examination (S63)	Series 63	08/09/1995
---	-----------	------------

PROFESSIONAL DESIGNATIONS

This section details that the representative has reported **0** professional designation(s).

No information reported.



Registration & Employment History

PREVIOUSLY REGISTERED WITH THE FOLLOWING FIRMS

This representative held registrations with the following firms:

	Registration Dates	Firm Name	ID#	Branch Location
B	03/01/2011 - 08/23/2016	FOOTHILL SECURITIES, INC.	CRD# 1027	RENO, NV
B	09/08/2009 - 03/09/2011	LPL FINANCIAL LLC	CRD# 6413	RENO, NV
IA	09/25/2009 - 12/08/2009	LPL FINANCIAL CORPORATION	CRD# 6413	RENO, NV
IA	01/04/2002 - 10/13/2009	ASSOCIATED PLANNERS INVESTMENT ADVISORY INC	CRD# 104790	RENO, NV
B	06/30/1995 - 09/08/2009	ASSOCIATED SECURITIES CORP.	CRD# 12969	RENO, NV
IA	05/12/2004 - 07/13/2004	AMERICAN RETIREMENT PLANNERS	CRD# 122205	RENO, NV
IA	03/04/1998 - 12/31/2002	AMERICAN RETIREMENT PLANNERS	CRD# 122205	RENO, NV
B	04/02/1997 - 06/05/2002	ASSOCIATED PLANNERS SECURITIES CORPORATION OF NEVADA, INC.	CRD# 30200	RENO, NV

EMPLOYMENT HISTORY

Below is the representative's employment history for up to the last 10 years.

Employment Dates	Employer Name	Position	Investment Related	Employer Location
03/2018 - Present	TRONDHEIM MANAGEMENT II, LLC	OWNER/MEMBER	Y	RENO, NV, United States
02/2018 - Present	TRONDHEIM MANAGEMENT LLC	OWNER/MEMBER	Y	RENO, NV, United States
08/2016 - Present	MS HOWELLS & CO	REGISTERED REPRESENTATIVE	Y	SCOTTSDALE, AZ, United States
04/2015 - Present	MODEL STRATEGIST PROGRAM	OWNER	Y	RENO, NV, United States
01/2014 - Present	RENO GAZETTE JOURNAL, A GANNETT COMPANY	WRITER	N	RENO, NV, United States
03/2011 - Present	Insurance Sales	Agent	Y	Reno, NV, United States
06/2008 - Present	AMERICAN WEALTH MANAGEMENT	OWNER	Y	RENO, NV, United States



Registration & Employment History

EMPLOYMENT HISTORY

Employment Dates	Employer Name	Position	Investment Related	Employer Location
01/2002 - Present	NEVADA AREA COUNCIL BOY SCOUTS OF AMERICA	BOARD MEMBER	N	RENO, NV, United States
01/2000 - Present	V-STAX PRIVATE PLACEMENT	INVESTOR	Y	HENDERSON, NV, United States
06/2011 - 03/2018	ADVISORSHARES	SUB-ADVISOR	Y	BETHESDA, MD, United States
03/2011 - 08/2016	FOOTHILL SECURITIES, INC.	REGISTERED REPRESENTATIVE	Y	RENO, NV, United States

OTHER BUSINESS ACTIVITIES

This section includes information, if any, as provided by the representative regarding other business activities the representative is currently engaged in either as a proprietor, partner, officer, director, employee, trustee, agent, or otherwise. This section does not include non-investment related activity that is exclusively charitable, civic, religious, or fraternal and is recognized as tax exempt.

- 1) JUNE 2008; AMERICAN WEALTH MANAGEMENT; RENO, NV; INVESTMENT RELATED; REGISTERED INVESTMENT ADVISOR; OWNER, PRESIDENT; CONDUCT DAILY QUANTITATIVE RESEARCH, CCO, PORTFOLIO MANAGER; DEVOTE 160 HOURS PER MONTH; 140 HOURS PER MONTH ARE DURING MARKET HOURS.
- 2) MARCH 2011; LIFE AND HEALTH INSURANCE; RENO, NV; INVESTMENT RELATED; AGENT; INSURANCE SALES; DEVOTE 2 HRS/MO, 2 HRS DURING MARKET HOURS.
- 3) MODEL STRATEGIST PROGRAM; INVESTMENT RELATED- Yes; 570 Hammill Ln Reno, NV 89511; Nature- RIA; Position/Title- PRESIDENT; April 2015; 5 hrs per month, 0 during market hours; Description- AWM PROVIDES WEEKLY INVESTMENT SIGNALS TO OUTSIDE REGISTERED INVESTMENT ADVISORS
- 4) Scouting America; Investment related- No; Reno, NV; Nature- Teach youth values and leadership; Position/Title- Board Member; Start date 10.1.02; Approximately 1 hour per month, 0 during trading hours; Description- Assist with membership growth
- 5) FEB 2018; TRONDHEIM MANAGEMENT, LLC; INVESTMENT RELATED- Yes; 560 Hammill Ln. Reno, NV 89511; Nature- HOLDING COMPANY FOR COMMERCIAL PROPERTY; Position/Title- OWNER/MEMBER; Start Date- Feb 2018; DEVOTE 1 HRS/MO, 0 DURING MARKET HOURS.
- 6) MARCH 2018; TRONDHEIM MANAGEMENT II, LLC; INVESTMENT RELATED- yes; 550 Hammill Ln Reno, NV 89511; Nature- COMMERCIAL REAL ESTATE HOLDING COMPANY; Position/ Title- OWNER/MEMBER; Start Date- March 2018; DEVOTE 1 HRS/MO, 0 DURING MARKET HOURS
- 7) LAIF E & CARA MEIDELL TTEES LAIF E & CARA MEIDELL REV TR DTD 3/2/07, RENO, NV; INVESTMENT RELATED; INVESTMENT PROPERTIES; OWNER MEMBER; DEVOTE 1 HR/MONTH DURING NON MARKET HOURS.
- 8) Renown Health Foundation; Investment-related- No; 245 E Liberty St #400 Reno, NV 89501; Nature- Assist in educational activities that provide financial support to Renown Regional Medical Center, a non-profit hospital; Position/Title- Board Member; Start date- 3.1.23; Approximately 0.5 hours per month 0 zero during trading hours; Description- Help educate the community on the services, benefits, and needs of the Renown Medical Center
- 9) Nevada Museum of Art; Investment-related- No; Reno, NV; Nature- Serve on the governance board for the Museum; Position/Title- Board Member; Start Date- 1.1.26; Approximately 1 hour per month, 0 during trading hours; Description- Oversee the use of funds received by the Museum to ensure they are used judiciously & constructively in fulfilling the mission for the Museum.
- 10) TRONDHEIM MANAGEMENT III, LLC; INVESTMENT RELATED- Yes; Reno, NV; Nature- Commercial building purchased in August of 2025 to lease office space to American Wealth Management; Position/Title- OWNER; Start Date- 1.1.26; DEVOTE 1 HRS/MO, 1 DURING MARKET HOURS; Description- Property Management



Disclosure Summary

Disclosure Information

What you should know about reported disclosure events:

(1) Certain thresholds must be met before an event is reported to IARD, for example:

- A law enforcement agency must file formal charges before an Investment Adviser Representative is required to report a particular criminal event.;
- A customer dispute must involve allegations that an Investment Adviser Representative engaged in activity that violates certain rules or conduct governing the industry and that the activity resulted in damages of at least \$5,000.

(2) Disclosure events in IAPD reports come from different sources:

As mentioned in the "About IAPD" section on page 1 of this report, information contained in IAPD comes from Investment Adviser Representatives, firms and regulators. When more than one of these sources reports information for the same disclosure event, all versions of the event will appear in the IAPD report. The different versions will be separated by a solid line with the reporting source labeled.

(3) There are different statuses and dispositions for disclosure events:

- A disclosure event may have a status of *pending*, *on appeal*, or *final*.
 - A "pending" disclosure event involves allegations that have not been proven or formally adjudicated.
 - A disclosure event that is "on appeal" involves allegations that have been adjudicated but are currently being appealed.
 - A "final" disclosure event has been concluded and its resolution is not subject to change.
- A final disclosure event generally has a disposition of *adjudicated*, *settled* or *otherwise resolved*.
 - An "adjudicated" matter includes a disposition by (1) a court of law in a criminal or civil matter, or (2) an administrative panel in an action brought by a regulator that is contested by the party charged with some alleged wrongdoing.
 - A "settled" matter generally represents a disposition wherein the parties involved in a dispute reach an agreement to resolve the matter. Please note that Investment Adviser Representatives and firms may choose to settle customer disputes or regulatory matters for business or other reasons.
 - A "resolved" matter usually includes a disposition wherein no payment is made to the customer or there is no finding of wrongdoing on the part of the Investment Adviser Representative. Such matters generally involve customer disputes.

(4) You may wish to contact the Investment Adviser Representatives to obtain further information regarding any of the disclosure events contained in this IAPD report.



DISCLOSURE EVENT DETAILS

When evaluating this information, please keep in mind that some items may involve pending actions or allegations that may be contested and have not been resolved or proven. The event may, in the end, be withdrawn, dismissed, resolved in favor of the Investment Adviser Representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

This report provides the information exactly as it was reported to the Investment Adviser Registration Depository. Some of the specific data fields contained in the report may be blank if the information was not provided.

The following types of events are disclosed about this representative:

Type	Count
Customer Dispute	1

Customer Dispute

This section provides information regarding a customer dispute that was reported to the Investment Adviser Registration Depository (IARD) by the Investment Adviser Representative (IAR), an investment adviser and/or securities firm, and/or a securities regulator. The event may include a consumer-initiated, investment-related complaint, arbitration proceeding or civil suit that contains allegations of sales practice violations against the individual.

The customer dispute may be pending or may have resulted in a civil judgment, arbitration award, monetary settlement, closure without action, withdrawal, dismissal, denial, or other outcome.

Disclosure 1 of 1

Reporting Source: Individual

Employing firm when activities occurred which led to the complaint: ASSOCIATED SECURITIES CORP.

Allegations: ON JANUARY 31, 2003, CUSTOMER INVESTED \$150,000 IN THE RYDEX URSA FUND IN HER INVESTMENT ADVISORY ACCOUNT. THIS MUTUAL FUND PERFORMS INVERSE TO THE S&P 500, I.E. WHEN THE S&P INDEX DECREASES IN VALUE, THE FUND APPRECIATES IN VALUE. THIS FUND AND ITS INVESTMENT STRATEGY WAS DISCUSSED IN GREAT DETAIL WITH BOTH THE CLIENT AND HER DAUGHTER PRIOR TO THE INVESTMENT BEING MADE & CONSENT WAS OBTAINED TO MAKE THE INVESTMENT. OVER THE NEXT 2 MONTHS, THE FUND APPRECIATED IN VALUE AS THE MARKET DECLINED. HOWEVER AS THE STOCK MARKET BEGAN TO TURNAROUND AND INCREASE IN VALUE, THE MARKET GAINS THAT THE RYDEX INVESTMENT EXPERIENCED BEGAN TO DECLINE AND THE VALUE OF THE FUND DROPPED BELOW THE AMOUNT INITIALLY INVESTED. ON MAY 28, 2008, THE RYDEX INVESTMENT WAS SOLD IN ORDER TO MINIMIZE FURTHER LOSS TO THE PORTFOLIO. THE LOSS WAS APPROXIMATELY \$17,000. IN OR ABOUT JULY 2003 (TWO MONTHS AFTER EXPERIENCING THIS MARKET LOSS), THE CLIENT THEN COMPLAINED THAT THE INVESTMENT WAS RISKY AND UNSUITABLE.

Product Type: Mutual Fund(s)

Alleged Damages: \$17,000.61

Customer Complaint Information

Date Complaint Received: 07/10/2003

Complaint Pending? No



Status: Settled

Status Date: 07/24/2003

Settlement Amount: \$17,000.61

Individual Contribution Amount: \$17,000.61

Broker Statement

THE ACCOUNT RELATIONSHIP BEGAN IN JUNE 2000. THE CLIENT'S NEW ACCOUNT DOCUMENTS SHOWED 20 YEARS INVESTING IN EQUITIES, AN INVESTMENT OBJECTIVE OF GROWTH & MODERATE RISK TOLERANCE. AT ACCOUNT OPENING, THE CLIENT DEPOSITED STOCKS INTO HER BROKERAGE ACCOUNT & HELD THEM. AS A RESULT, SHE WAS INVESTED NEARLY 100% IN EQUITIES. IN JULY OF 2000, HER ACCOUNT WAS WORTH APPROXIMATELY \$760,000. THE CLIENT ALSO EXPERIENCED MARKET VOLATILITY DUE TO THE UNPRECEDENTED 2000 - 2002 MARKET RECESSION. DURING THIS PERIOD, THE STOCKS SHE HELD IN HER BROKERAGE ACCOUNT DECREASED APPROXIMATELY \$200,000 IN VALUE. THE CLIENT EXPRESSED NO COMPLAINTS ABOUT THIS LARGE DECLINE. IN SEPT. 2002, HER BROKERAGE ACCOUNT CONVERTED TO AN ADVISORY ACCOUNT AND WAS MANAGED FOR A QUARTERLY FEE. A PORTION OF THE CLIENT'S PORTFOLIO WAS INVESTED IN INDIVIDUAL BONDS. THE 01/31/03 PURCHASE OF THE RYDEX FUND WAS DISCUSSED WITH THE CLIENT AND HER DAUGHTER BEFORE ITS PURCHASE. BETWEEN FEBRUARY AND MAY 2003, THERE WAS ALSO CONTACT WITH THE CLIENT OR HER DAUGHTER ON A MONTHLY BASIS WHILE THE FUND WAS HELD. THE CLIENT WAS CONTENT WHILE THE RYDEX FUND INCREASED IN VALUE. HOWEVER, AS THE MARKET BEGAN TO RECOVER, THE GAINS THE FUND HAD EXPERIENCED DECLINED, AND THE FUND VALUE SUBSEQUENTLY FELL BELOW THE AMOUNT INVESTED. THE FUND WAS SOLD ON 05/28/03 TO MINIMIZE ANY FURTHER LOSSES IN THE PORTFOLIO. I HAD NO FURTHER CONTACT UNTIL JULY 2003, NEARLY TWO MONTHS AFTER THE RYDEX FUND WAS SOLD, WHEN THE CLIENT'S DAUGHTER CALLED MY BROKER DEALER DIRECTLY AND COMPLAINED ABOUT HER MOTHER'S ACCOUNT. A FEW DAYS LATER, IN A PHONE CALL I HAD WITH THE CLIENT'S DAUGHTER, SHE TOLD ME THAT THE \$17,000 MARKET LOSS FROM THE RYDEX FUND HAD UPSET HER MOTHER & HER MOTHER WAS IN POOR HEALTH. TO AVOID THE COSTS OF PROTRACTED LITIGATION, A GOOD-FAITH OFFER WAS MADE TO THE CLIENT & DAUGHTER TO SETTLE FOR 17,000.61 WITH NO ADMISSION OF FAULT/LIABILITY BY MYSELF & MY FIRM.



End of Report

This page is intentionally left blank.