

# Investment Management Services

Appropriate for those with \$500,000 or more in investable assets.



At Veery Capital, we're not your typical wealth management firm. We deliver the services below in a down-to-earth, friendly process that makes your investment management simple and easy.



**We'll help you create a net worth statement because it's important to understand all of your accounts when managing your money.**

- Bank accounts
- Investment accounts
- Real estate



**You'll receive an in-depth analysis of your manageable accounts.**

- Allocation
- Diversification
- Underlying investments like stocks, bonds, mutual funds, exchange-traded funds, and annuities
- Taxes
- Costs



**We'll provide ongoing updates.**

- Annual review meeting
- Net worth statement
- Goals
- Allocation
- Performance
- Quarterly statements
- Portfolio rebalancing, as needed
- Tax efficiency, non-qualified vs. qualified
- Performance reviews

## How We're Compensated

Our most successful relationships are with clients who would prefer to give up the day-to-day management of their assets and enjoy the benefits of the customized investment plan we created together.

Investment Management Services	
Investments	Advisor Fee
\$0 - \$750,000	1.00%
\$750,001 - \$2,000,000	0.80%
\$2,000,001 - \$3,000,000	0.54%
\$3,000,001 - \$4,000,000	0.43%
\$4,000,001 - \$5,000,000	0.35%
\$5,000,001+	0.18%

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