

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
Up to \$1,000,000	1.15%
Next \$1,000,001 to \$2,000,000	0.81%
Next \$2,000,001 to \$3,000,000	0.56%
Next \$3,000,001 to \$4,000,000	0.39%
Next \$4,000,001 to \$5,000,000	0.26%
Next \$5,000,001 to \$10,000,000	0.17%
Next \$10,000,001 to \$15,000,000	0.11%
Over \$15,000,001	0.07%