Financial Planning Services

Appropriate for those with $1 million 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 wealth management simple and easy.

Net Worth Management

- Analyze investment accounts and real estate
- Create strategies to help balance or grow any given area
- **Investments**
    - *Review allocation, diversification, and cost*
    - *Meet annually to review*
    - *Review any/all company-sponsored plans*
- **Real Estate**
    - *Analyze the client's current real estate portfolio*
        - *Personal residence, second home, rental properties, commercial real estate*
- **Debt management/leverage**
    - *Analyze the client's existing equity, debt, and cash flow for all properties*
    - *Determine alternative scenarios to grow wealth*
        - *Refinance, equity lines of credit, 1031 Exchange, etc.*

Cash Flow Management

- Systematic savings strategies
- Debt pay-down strategies
- Refinancing strategies

Retirement Planning

- We help you determine your goals in retirement and develop a strategy to meet them with conservative assumptions. Retirement means something different to everyone. Our goal is to define what retirement means to you and encourage you to take the leap. If you have never worked with a firm like ours, our guess is you can retire sooner than you think!

Estate Planning

- Review proper beneficiaries
    - *Retirement accounts*
    - *Life insurance*

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Risk Management

- Review personal disability and life insurance
- Cost, coverage, appropriate ownership for tax benefits

Education Planning

- Project the cost of college and the best way to pay
- Help clients to understand how much to save for a college savings account vs. other vehicles
- Assist with withdrawing money from college savings accounts to pay an institution or other bills

How We're Compensated

We'll provide this helpful array of services while managing your assets. We believe this gives you the best chance for success in achieving your goals while allowing us to monitor your plan safely and securely. Our minimum investment for financial planning services is $1 million.

Financial Planning 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%