

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% |