



Tell us a bit about yourself.

Where are you in your financial life and what are you investing for? Dream Vacation? Sending your child to College? Nice comfortable retirement?



We'll help you build a plan.

Based on your answers, we'll build a financial plan and use our technology and expertise to construct a personalized portfolio.



Then, we put our magic to work.

And we keep working. Once we get you set up, we'll manage your portfolio with our tax-efficient technology.

Our mission: to help thousand-aires become millionaires.

✓ Built for better returns.

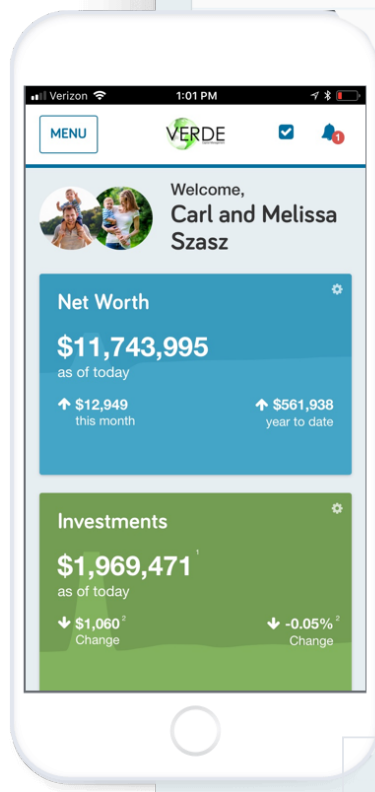
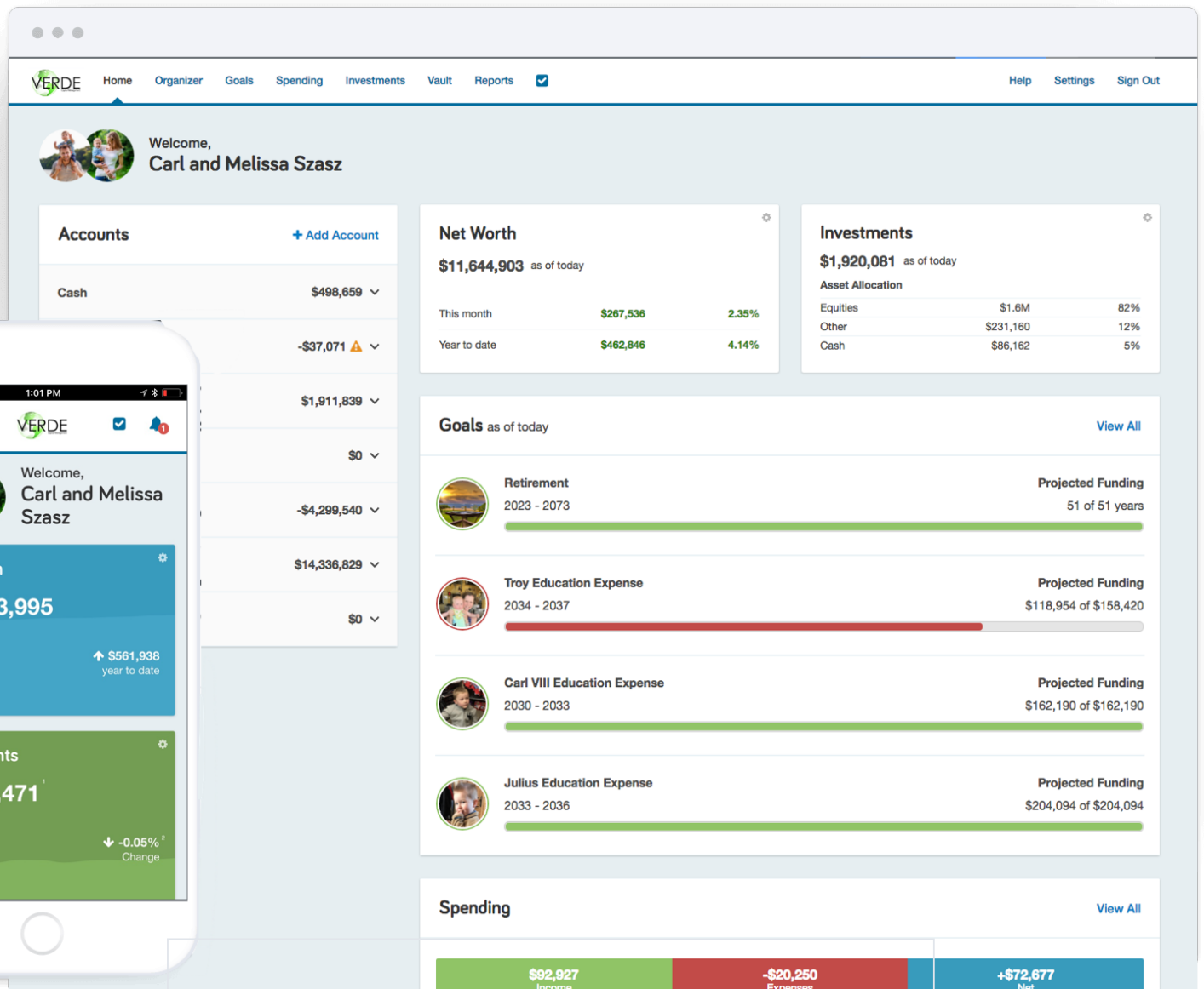
Holistic goal based planning? Diversified Investments? We're designed for that. Our advisors and technology take complex scenarios and make them more efficient.

✓ Personalized advice.

You have questions? Send them our way. You have unlimited access (<http://www.verdecn.com/services/individual-services/>) to your own licensed financial expert – anytime, anywhere.

✓ Transparent straight forward pricing, starting at \$100 per month.

Hidden costs? Commissions for selling products that are not in your best interest? Nowhere to be found, No matter who you are or how much you invest, you get everything for one simple, transparent fee.



Digital

Starts at

\$100/month

Get started (<https://connect.emaplan.com/215>)

\$5,000 Minimum balance

Fees based on annual income

✓ **Personalized financial advice**

Know how much to invest, your recommended asset allocation, and more.

✓ **Live life in balance**

Know how much you are spending, and how much you should be saving using our cash flow tracking tool.

✓ **Plan for what can go wrong**

Job loss, getting sick, a death in the family. Gain peace of mind by planning for the unexpected, should it occur.

✓ **Low-cost, globally diversified investment portfolios**

Invest in funds chosen to help maximize your money at various levels of risk.

✓ **Automatic re-balancing**

Maintain your target allocation (/asset-allocation) when the market causes it to shift.

✓ **Advanced tax-saving strategies**

Automate tax loss harvesting and asset location to increase your after-tax returns.

✓ **Everything in one place**

Sync external accounts to get a 360 degree view of your money.

✓ **Access to your own personal licensed financial expert anytime, anywhere**

Get unlimited access to your own financial coach who is there to answer your questions, motivate and inspire you, and most importantly, help you achieve your goals.

Traditional

Annual fee

1.50%

Get started (<https://connect.emaplan.com/19x>)

\$80,000 Minimum balance

Fees based on account balance

✓ **All the benefits of our Digital plan**

✓ **In-depth advice on investments outside of Verde**

Create a plan for managing 401(k)s, real estate, and individual stocks.

✓ **Shop your insurances**

Get access to our third party network of insurance advisors. Shop your different insurance policies to make sure you are getting the best value for your money.

✓ **Get quarterly 1 on 1 (in person) meetings with our licensed professionals for guidance on life events**

- **Getting married?** Make sure your goals are aligned, decide how to combine your money, set financial boundaries, and decide how to allocate your money across your retirement plans.
- **Having a child?** Save for college, prioritize family goals, select life insurance, and discuss your estate plan.
- **Managing equity-based compensation?** Understand your plan, walk through possible tax implications, and manage the potential risks.
- **Retiring?** Plan for your transition from saving to spending, and create a tax-efficient withdrawal strategy. Decide when to take social security (/social-security) and how to manage your employer provided pension.

Verde Capital Management

📍 8031 Ortonville Road
Suite 170
Clarkston, MI 48348

📞 Phone: 248-528-1870 (tel:248-528-1870)
Fax: 248-528-1744

🕒 8:00am – 5:00pm
Monday to Friday

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Our newsletter

Verde Capital Management welcomes Cynthia Lundberg, our newest Associate Advisor.

your email address



🕒 1 January 2018 (<http://www.verdecapital.com/about-us/meet-our-team/>)

Introducing a new investment product for our Wealth Management clients: Private debt financing, such as providing bridge loans.

🕒 30 January 2018

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