Why does your financial consultant partner with LVZ Advisors? COMPETENCE—CONFIDENCE—CHARACTER

OUR TEAM

WHY LVZ?

Even the most successful professional racers depend on a talented pit crew to make a winning team. That is why your financial consultant decided to become a LVZ Preferred Colleague. Financial consultants wear many hats—research, service, administration, and coordination, just to name a few. They are more than a manager, which means they have a lot on their plate. Our team backs up your consultant by keeping a dedicated eye on your investments every day. We have decades of experience in money management and other specialized fields in financial planning that, when coupled with your consultant's experience, maximizes your "horsepower." This could make a significant difference over your lifetime of investing.

Most importantly, LVZ Advisors frees your financial consultant to focus more on providing you with the personal attention and service you need to keep your financial plan fine-tuned for your future. Having us behind the scenes, supporting your consultant, is a sound strategy for reaching your financial goals.

CONFIDENCE BACKED BY COMPETENCE

LVZ Advisors has a fifty-year history of excellence. Since 1960, we have grown from a well-respected financial planner to a wealth management firm serving clients across the country. Our team of financial professionals has a wealth of knowledge and experience in the industry, fully equipping us to manage your assets.

LVZ partners with like-minded colleagues who share our investment philosophy and culture, including your financial consultant, and provides top-notch money management services. Today, we manage over $300 million in assets for our colleagues' clients. As we keep on growing, we will continue to evaluate the needs and desires of our colleagues and their clients so we can provide competitive money management service.

TIME-HONORED VALUES, INNOVATIVE STRATEGIES

LVZ Advisors calls Holland, Michigan, home—a small town where time-honored values and business practices are still held in high esteem. We are proud of the character we've inherited and our distinctive investment philosophy.

Our proprietary process actively manages risk in your portfolio, taking advantage of economic and market trends while remaining diversified. We mitigate risk by building a portfolio of dissimilar types of securities, which we expect to respond differently to market conditions in most situations. We take a proactive approach to in managing this counterbalanced portfolio by increasing allocations to those asset classes that show the most potential for better future performance, while reducing allocations in asset classes that face the most resistance. Our flex position shifts from fully invested in equities to fully invested in fixed income depending on our market outlook. Asset allocation and diversification do not guarantee profit or protect against loss in a declining market. They are methods used to help manage investment risk.

MODEL PORTFOLIOS WE OFFER

CLASSIC PORTFOLIOS

GROWTH

Comprised of up to 100% equities; at times a portion may be allocated to fixed income or cash equivalents

GROWTH & INCOME

Comprised of approximately 80% equities, with the remainder allocated to fixed income securities or cash equivalents

BALANCED

Comprised of approximately 60% equities, with the remainder allocated to fixed income securities or cash equivalents

INCOME & GROWTH

Comprised of approximately 40% equities, with the remainder allocated to fixed income securities or cash equivalents

SPECIALTY PORTFOLIOS

CAPITAL PRESERVATION & INCOME

Comprised of fixed income securities and may include, to a lesser degree, convertible bonds, preferred stocks, and alternative investments

MULTI-ASSET INCOME

Seeks a high income stream by using a diversified portfolio of income generating ETF's and mutual funds

STRATEGIC INCOME

Comprised of income-producing securities, including fixed income, dividend paying equities, and money markets

STRATEGIC GROWTH

Seeks to take advantage of the growth potential of equities while preserving the option to utilize fixed income and cash positions

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LVZ Privacy Policy