



Meet
**Jared
VanDenBerg**

Specializations:

- Retirement Planning
- Tax Planning
- College Planning
- Estate Planning
- Investment Portfolio and 401(k) Advice & Monitoring
- Social Security
- Medicare
- Insurance & Risk Management

Qualifications:

- CFP® (CERTIFIED FINANCIAL PLANNER™)
- BS in Finance with a concentration in Investing from Ferris State University

Jared VanDenBerg, CFP®

Jared provides comprehensive wealth management strategies to help people optimize their financial lives. As a financial adviser, he works closely with clients to make smart decisions that can help them reach their financial goals. His services include retirement and tax planning as well as investment portfolio advice.

Jared is a CERTIFIED FINANCIAL PLANNER™. He received a BS in Finance with a concentration in Investing from Ferris State University. Jared is also a member of the Dave Ramsey Smartvestor Pro program.

What influenced your decision to join Advance Capital?

The biggest influence on my decision to join Advance Capital was its commitment to treat clients as individuals. This fully aligns not only

(Continued on back.)



625 Kenmoor Avenue, Suite 307, Grand Rapids, MI 49546

p: (800) 444-1053 • e: jvandenber@acadviser.com • www.acadviser.com



Go to acadviser.com to learn more about Smartvestor Pros.

Jared VanDenBerg (continued)

p: (800) 444-1053

e: [jvandenber@
acadviser.com](mailto:jvandenber@acadviser.com)

Connect with me
on LinkedIn!



with my professional goals, but my personal morals as well. In addition, working here is an opportunity to help people solve difficult problems, such as reaching and navigating retirement.

How would you describe Advance Capital's culture?

Our culture is focused on providing the highest quality of service for clients in every aspect of their financial lives. It's why we are committed to low costs, which allows clients to keep more of what they earn; it's why we have a strong emphasis on staying up to date on the latest research; and lastly, it's why those who practice hard work and a dedication to the client thrive in our culture.

Describe the importance of client education in your process.

My primary duty is to assist clients in making smart, informed financial decisions. To do so, it's imperative that I provide the necessary information and education that can best help them.

Where do good solutions come from?

I think good solutions come from those who can see the whole picture in any given scenario without bias. For my clients, it's about focusing on their financial goals to find the best steps to get there. We work to find the solution that is right, not just the solution we want.

What does it take to be successful in your role?

Success in my role requires hard work and dedication as well as a commitment to learn. The financial landscape constantly changes, so it's important to fully understand each client's situation and to have the most relevant information. Also, success depends on building strong relationships, which takes efficiency, timeliness and a proven ability to help solve problems.

Investment advisory services are provided by Advance Capital Management, Inc.

Investments are not insured, and may lose money. Client should be prepared to bear the risks associated with investing.

Fun Fact!

Jared is a longtime outdoorsman, but his best day deer hunting was his very first day, when he was only 11 years old. He got an eight-point buck. Unfortunately, he has not been as lucky since. However, today he is more focused on teaching his son various outdoor activities, including hunting and his son's personal favorite, fishing. Time will tell if he has better luck than his dad.