

Meet

Jeff Lido



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 Business Administration from Western Michigan University

Honor:

- “Best In State” Wealth Adviser (*Forbes*)

Jeffrey N. Lido, CFP®

Jeff actively learns what is most important to people to better help him build and implement personalized financial plans for them. As a financial adviser, his goal is to put clients on a path toward the future they want. To help clients get there, he provides comprehensive wealth management services such as investment portfolio management, estate planning, retirement planning and tax planning.

Before joining Advance Capital in 2003, Jeff managed a small communications firm. He has earned the CERTIFIED FINANCIAL PLANNER™ designation. Jeff is also a member of Advance Capital Management’s investment committee.

Jeff received a BS in Business Administration from Western Michigan University. He is a member of the Financial Planning Association of Michigan. Jeff has been named a “Best-in-State Wealth Advisor” by *Forbes* magazine.

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Were there any particular learning experiences that prepared you for this role?

I was actually recruited into the finance industry by an uncle who needed help managing money for a lotto winner. Unfortunately, this was when the tech bubble burst in the late 90s. The client panicked and fled the stock market. This experience showed me the role emotions can play in investing and how they can affect someone's financial future. I learned the importance of helping people to think long term and stay on track with an appropriate financial plan, especially during volatile markets.

Describe a typical day for you.

No two days are alike, which I enjoy. Generally, each day is a balance between reactive and proactive activities. My goal is to put all clients first, so I accommodate client requests but also take the initiative to reach out to clients who may need my help but haven't asked. The hours needed to accomplish this vary, so I don't stop until I know the work is done.

Describe the importance of client education in your process.

I firmly believe that a well-educated client is more likely to follow their financial plan and succeed. Education helps people stay calm during choppy markets. The more a person knows about finance, the more comfortable they typically are navigating their financial life. That's why I want each client to understand what I'm recommending and why. It's important for building trust. My clients can see that my goals and objectives are on the same side as theirs.

What do you find most rewarding about your work?

Nothing is more rewarding than being able to sit down with longtime clients to tell them that all their hard work and sacrifice has paid off, and they can now live the comfortable retirement they want. Helping people achieve financial goals, whether it's retirement or a college education, is a fulfilling experience. Certainly, the thanks I get feels good, too!

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!

Even though Jeff doesn't know which side of a hammer to use, he still travels to Juarez Mexico annually to build houses for families in need.