

# Meet Jerry Malone



## Specializations:

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

## Qualifications:

- BS in Finance and MBA in Accounting and Finance from Wayne State University

## Gerald W. Malone, MBA

Jerry is motivated by the desire to make a difference in people's financial lives. As a financial adviser, he provides practical advice to help families and individuals secure their financial futures. He assists clients with comprehensive wealth management services, including tax and retirement planning and investment portfolio recommendations. Jerry is also a member of Advance Capital Management's investment committee.

Before joining Advance Capital in 2000, Jerry held positions at Comerica Bank and JP Morgan Chase.

Jerry is a graduate of Wayne State University with a bachelor's degree in Finance and an MBA in Accounting and Finance.

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# Jerry Malone (continued)

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## How have you progressed and evolved through your time at Advance Capital?

Advance Capital had just experienced their best year of growth prior to my start. Additional advisers were needed to handle both the increased growth and the future transition of retiring advisors. I began here working with and being mentored by Bob Cappelli, one of our founders. Nearly two decades later, I am now one of the more senior advisers and I mentor other advisers.

## Describe a typical day for you.

The majority of my day is spent servicing client accounts and helping clients reach their goals and objectives. With many clients who all have different goals and objectives, my job is both challenging and rewarding.

## How would you describe Advance Capital's culture?

Advance Capital's culture is about meeting client expectations and not sales goals. We provide honest assessments of each client's financial situation. We don't tell clients what to do, but rather the advantages and disadvantages of their options. Our industry doesn't always have the best reputation, which is why we are extremely proud of our company and its culture.

## What do you find most rewarding about your work?

I really enjoy helping people achieve their financial goals or realize their aspirations. It is a truly rewarding experience to build a relationship with people and see them succeed. I really believe in our process and know that when we put our clients' interests first, we develop lifetime clients.

## What does it take to be successful in your role?

Success in our industry boils down to trust and knowledge. I think a successful financial adviser always puts the needs of his or her clients first. I tell people that my job is to provide the right financial advice, whether or not I get paid or hired. I believe this honest approach is what makes the firm successful as it keeps our clients happy and turns them into our biggest advocates.

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!

Jerry and his family owns horses. He enjoys riding and jumping as often as he can. He also enjoys to slalom water ski and golf.