

Meet

Vince Vitale



Specializations:

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

Qualifications:

- CFA (Chartered Financial Analyst)
- CAIA (Chartered Alternative Investment Analyst)
- MS in Finance - Financial Planning Specialization from Walsh College
- BA in Finance from Michigan State University

Vince Vitale, CFA, CAIA

Vince is committed to helping individuals and families feel confident about their financial well-being. He is a Chartered Financial Analyst and Chartered Alternative Investment Analyst. Taking a holistic approach, he educates and guides clients on all of life's financial decisions involving investments, retirement, taxes, insurance, estate planning and more. His ultimate objective is to help people achieve their financial goals and retirement dreams.

Prior to serving as a financial adviser, Vince held several roles on Advance Capital's investment team. He was an equity analyst, portfolio manager and director of research, where he contributed to the development of the firm's investment philosophy and process for constructing client investment portfolios.

Vince earned a Master of Science degree in finance with a financial planning specialization from Walsh College and a Bachelor of Arts degree in finance from Michigan State University. He completed the Harvard Business School's Investment Management Leadership Certificate Program. He also serves as a Board Member/Treasurer for the CFA Society of Detroit and Executive Board Member/Treasurer for the Men Who Care Corporation.

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ADVANCE
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What influenced your decision to join Advance Capital?

Many wealth management firms have earned their keep by pushing high-cost products to their clients to make the biggest paycheck. I decided to join Advance Capital Management because of its client-advocate culture and attitude. As a fiduciary, we always put the client's best interest first and hold ourselves to a higher ethical standard.

How would you describe Advance Capital's culture?

Our culture is focused on client goals rather than sales goals. Instead of working to accumulate commissions from our clients, we work to build relationships with and assets for our clients. I think our culture makes us more successful as a company, as it allows us to provide honest, objective advice – even when that advice can be difficult to hear, such as it is better for you to work a little longer.

What do you think is important about giving back to your community – both at the firm and for you personally?

Having served with a variety of non-profit organizations, I understand how fortunate most of us are and truly empathize with those who endure much harder circumstances. I believe it is incumbent on all individuals to give back to their communities, whether it is through monetary donations or volunteer work. This is why I helped develop Advance Capital's philanthropic program, which seeks to partner with local non-profits that are making a difference in our community by providing grants and volunteers to each organization.

What is your favorite piece of advice?

Always be sincere! Nothing is more important than giving honest, thoughtful and truthful advice and guidance to the individuals, families and businesses I serve. Earning and keeping their trust is my priority.

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!

Vince's dedication to achieving lofty goals is reflective in his athletic career, too. As an avid golfer, he has played a third of the top 50 public golf courses in the United States, with the goal to play them all in his lifetime.