

VERA FINANCIAL SOLUTIONS

FOCUSING ON YOUR FUTURE

Referral List

| 401(k) Providers | | |
|--|---|---|
| Freedom One Mark Wayne 8031 M-15 Clarkston, MI 48348 (248) 620-8100 | | |
| Budgeting Consultants | | |
| Levanto Paul Cloutier 5755 New King Street Ste. 201 Troy, MI 48098 (248) 283-8775 Ext. 2351 | | |
| CPA's | | |
| Fenner Melstrom & Dooling Elaine Shenkosky, CPA 355 S. Old Woodard Ste. 200 Birmingham, MI 48009 (248) 258-8900 Ext. 1060 | Bocknek, Berger & Gherisi Alan LaDuke, CPA 43940 Woodward Ave Ste. 200 Bloomfield Hill, MI 48302 (248) 333-3680 Ext. 206 | Gordon Advisors, P.C. Alan Kristall, CPA 1301 W. Long Lake Road Ste. 200 Troy, MI 48098 (248) 952-0200 |
| Baker Tilly Sean Sant, CPA One Town Square Ste. 600 Southfield, MI 48076 (248) 368-8753 | | |
| Collaborative Divorce | | |
| Becker Legal, P.C. Lori Becker 42690 Woodward Ave Ste. 140 Bloomfield Hills, MI 48304 (248) 253-1111 | | |

Neither Vera Financial Solutions nor its representatives provide tax or legal advice. For specific tax or legal advice, please consult your tax or legal advisor. Material contained within has been assembled from sources we believe to be reliable.



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| Estate Attorneys | | |
|---|---|--|
| <p>Witzke Berry, PLLC 3883 Telegraph Road Ste. 207 Bloomfield Hills, MI 48302 (248) 971-1700</p> | <p>Frasco, Caponigro, Wineman & Scheible, PLLC Roy A. Luttmann 1668 Telegraph Rd Ste. 200 Bloomfield Hills, MI 48302 (248) 334-6767</p> | <p>Frank Haron Weiner, PLLC Jerry Weiner 5435 Corporate Drive Ste. 225 Troy, MI 48098 (248) 952-0400</p> |
| <p>Butzel Long Bob Perry 100 Bloomfield Hills Parkway Bloomfield Hills, MI 48304 (248) 258-1616</p> | <p>Bodman Anthony Cracchiolo 1901 St. Antoine Street 6th Floor of Ford Field Detroit, MI 48226 (313) 393-7552</p> | |
| Life, Disability, LTC and Health Insurance | | |
| <p>The Baker Group Greg Baker 26400 Lahser Ste. 312 Southfield, MI 48033 (248) 355-4100</p> | <p>Capitas Financial, LLC Craig Myers 40 Oak Hollow Ste. 340 Southfield, MI 48034 (248) 709-9028</p> | <p>ITG Advisors Derrick Walker 26300 Telegraph Rd Ste. 201 Southfield, MI 48033 (248) 761-1552</p> |
| <p>Schechter Benefits Advisors Mike Brasch 28555 Orchard Lake Road Ste. 110 Farmington Hills, MI 48334 (248) 534-0212</p> | <p>Genworth Financial Susan Poppert, CLTC 28175 Haggerty Road Novi, MI 48377 (248) 539-9411 (LTC Only)</p> | |
| Money Managers | | |
| <p>Morgan Stanley Rich Gorman, CFA 220 Park Street Ste. 220 Birmingham, MI 48009 (248) 593-7544</p> | <p>Merrill Lynch Aaron Pawlak 3030 Cross Creek Parkway Auburn Hills, MI 48326 (248) 475-1509</p> | <p>Encompass Financial Partners Chuck Craves 1050 Wilshire Drive Ste. 191 Troy, MI 48084 (248) 822-5000 Ext. 107</p> |

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| Money Mangers | | |
|--|---|--|
| JPMorgan Shawn Riley 2155 West Big Beaver Troy, MI 48084 (248) 273-9661 | JPMorgan Todd Trbovich 2155 West Big Beaver Troy, MI 48084 (248) 273-9672 | Well Fargo Bosart Investment Consulting Group 255 East Brown Street Ste. 400 Birmingham, MI 48009 (248) 433-8567 |
| FSC Securities Corporation Anthony Bonner 43230 Garfield Road Ste. 160 Clinton Township, MI 48038 (586) 569-4513 | | |
| Personal Bankers (Loans, Deposits, & Investments) | | |
| JPMorgan Mary Burke 2155 West Big Beaver Troy, MI 48048 (248) 273-9713 Net Worth \geq \$500,000 | JPMorgan Nicole Moten 2155 West Big Beaver Troy, MI 48048 (248) 273-9709 Net Worth \geq \$500,000 | JPMorgan Michael Reichenbach 2155 West Big Beaver Troy, MI 48048 (248) 273-9719 Net Worth \geq \$500,000 |
| Fifth Third Vito Gioia 1000 Town Center Ste. 1500 Southfield, MI 48075 (248) 603-0305 Net Worth \geq \$1 Million | JPMorgan Mike Robinson 1116 West Long Lake Rd Bloomfield Hills, MI 48302 (248) 645-7306 Net Worth \geq \$3 Million | |

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