



MARCO CAPALDI

Independent Insurance Advisor



Marco Capaldi is a financial representative with over 20 years experience in the financial services and insurance industries. He is a father of two girls and married to a public servant in the town of Warren, RI.

Marco began working in financial services in 1996 after obtaining a business admin degree with a minor in Finance from Roger Williams University. Marco opened Bellevue Investment Group in Newport, RI , a successful boutique investment firm in Newport, RI. In 2003. After close to 10 successful years the practice sold to one of the largest financial planning firms in Boston, MA From 2014-2016 Marco started a voluntary benefits student loan firm called Student Debt America that was bought in a private equity deal by venture capital. From 2016-2020 Marco gave his time to wounded veterans helping them improve their finances and start-up businesses. He is still active today in his spare time in making life easier for our veterans through his work with Veterans, Inc., The Vet. Center in Warwick grants throughout New England for federal government agencies like the CFPB and the SBA.

Marco's advanced knowledge of how true wealth works is an incredible asset to his clients, whom he coaches daily in many areas including:

- Retirement Income Planning
- Social Security and Pension Maximization
- Minimizing taxes and unnecessary transfers of wealth
- Life insurance, Medicare, and long term care planning
- Business Owner Retirement
- Business Owner Employee Benefits
- Business Owner Succession Planning

A licensed producer, Marco's consults with clients are always provided with no fee or obligation. Marco is a team player who works collaboratively with your CPA & Attorneys and enjoys meeting with them on your behalf. Marco has taught for the Mass Real Estate Bar association as well as the local AICPA and always is happy to provide educational credits for CPA, Attorney's, and other professionals.

Community Involvement includes SEED (South Eastern Economic Development) Lending institution board member, Roger Williams University Gabelli school advisory board, Providence VA Veteran Community Taskforce, Former East Bay Chamber Board & Former Bristol, RI Economic Development.

Marco grew up in the North Providence, RI area and is a La Salle Grad as well as Roger Williams University.

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CONTACT

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Licensed Life, Health, Annuity in:
RI, MA, CT, ME, NH,
TX, AZ, NV & FL

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“Achievers are resolute in their goals and driven by determination. Discouragement is temporary, obstacles are overcome, and doubt is defeated, yielding to personal victory.”

~ Gen. George S. Patton

Book an appointment: 401-447-9227 or calendly.com/mjcapaldi