



# ZACH MASON, CDFA®

FINANCIAL PLANNER AND  
CERTIFIED DIVORCE FINANCIAL ANALYST

## ABOUT

Zach Mason is an Arizona native who splits his time between his home state and California. He is a financial advisor, author, and the managing partner of Verus Capital Partners, a registered investment advisory firm that manages over \$1 billion in assets. He founded Live Richly to serve the divorce community.

## CONNECT

- (480) 597-4993
- [Info@LiveRichly.Life](mailto:Info@LiveRichly.Life)
- [www.LiveRichly.Life](http://www.LiveRichly.Life)

## CONTENT



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## SPECIALTIES

**Listening** and **understanding** the story, vision, and personal mission of divorcees.

**Creating, teaching,** and **applying** tools, resources, and strategies to help divorcees regain peace of mind and clarity.

**Developing** and **executing** financial plans and strategies built for meaningful progress and results by aligning them with my client's story, vision, and mission.

**Collaborating** with, **coaching,** and **leading** divorcees and their teams to make the divorce process, and life afterward, better.

## EXPERIENCE

- 2011-Present **MANAGING PARTNER AND FINANCIAL ADVISOR**  
*Verus Capital Partners LLC*  
I lead the growth of the firm by building and executing financial plans, tax strategies, insurance solutions, and investment portfolios.
- 2023-Present **FOUNDER AND CEO**  
*Live Richly LLC*  
I direct and expand the positive impact of the firm by creating financial services and resources specifically for divorcees.

## WHAT MY CLIENTS SAY

- "Zach has become a **trusted friend**"
- "I am so grateful, and you have **made this process much easier** for me"
- "Knowing you are going over all the financial information is **the only thing giving me peace of mind.**"
- "He's **highly intelligent** and **very organized.**"
- "We have been pleased with his **knowledge, advice,** and the **performance** of our investments."

## EDUCATION AND CERTIFICATIONS

- 2007 - 2011 **ARIZONA STATE UNIVERSITY**  
*W.P. Carey School of Business*  
*BSc Management, Entrepreneurship*
- 2020-2021 **HARVARD BUSINESS SCHOOL**  
*Certificate, Financial Technologies*
- 2022-2023 **UNIVERSITY OF CALIFORNIA, BERKELEY**  
*Certificate, Power of Awareness*

## PUBLICATIONS

- 2024 **THE DIVORCE RESOURCE**