

Edythe M. De Marco

Merrill Lynch Wealth Management



One Financial Plaza • Providence, RI 02903 • edythe_demarco@ml.com • www.fa.ml.com/demarco_group/



Edythe M. De Marco, CFP®
Managing Director
Wealth Management Advisor
Portfolio Manager
Phone: 401.863.8619
NMLS #: 13737

Edye is the founder of The De Marco Group at Merrill, in Providence. For 38 years, she has dedicated her career to offering highly personalized wealth management guidance to help families focus on living their lives to the fullest. Her Group’s mission is “to have a meaningful and lasting impact on the families they serve, to help them live the best life possible with given resources and to give them a sense of financial well-being.”

The De Marco Group helps clients manage both the accumulation and distribution phases of their financial lives. They guide and assist multiple generations in moving toward desired lifestyles and legacies for themselves, their families and favorite charitable causes. The Group focuses on pre-sale planning for business owners.

Edye is a CERTIFIED FINANCIAL PLANNER™ professional, awarded by the Certified Financial Planner Board of Standards in 2006. She has been recognized on *Barron’s* Top 100 Women Advisors (’17), Top 1,000 Financial Advisors: State-by-State (’09-’13) and Top 1,200 Financial Advisors (’14-’19) lists. *Forbes* named her on its Best-in-State Wealth Advisors (’18, ’19 and ’20) and Top Women Wealth Advisors (’19) lists.

A native of Los Angeles, Edye earned a bachelor’s degree in finance from Santa Clara University. As an adoptive parent, Edye serves on the Board of Foster Forward, an organization caring for foster youth and their families. She also serves on the Board of Governors for Bradley Hospital, the nation’s first psychiatric hospital for children and adolescents. She and her husband, Tom, live in Tiverton, with their college-age son. Edye enjoys many things French and Italian, including language, art, food, wine and travel. Edye also enjoys collecting bourbon.

Investing involves risk, including loss of principal.

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A Portfolio Manager can help clients pursue their objectives by managing on a discretionary basis [his/her] own Personalized or Defined Strategies, which may incorporate individual stocks and bonds, Merrill model portfolios, and third-party investment strategies.

Barron’s “Top 1,200 Financial Advisors” list, March 11, 2019. The ranking considered advisors with a minimum of seven years financial services experience and have been employed at their current firm for at least one year. This is a list of the top advisors in each state, with the number of ranking spots determined by each state’s population and wealth. Other quantitative and qualitative measures include assets under management, revenues generated by advisors for their firms, and the quality of the advisors’ practices, regulatory records, internal company documents, and 100-plus points of data provided by the advisors themselves. *Barron’s* is a trademark of Dow Jones & Company, Inc. All rights reserved. Rankings and recognition from *Barron’s* are no guarantee of future investment success and do not ensure that a current or prospective client will experience a higher level of performance results and such rankings should not be construed as an endorsement of the advisor. Years prior to 2014, this *Barron’s* list consisted of 1,000 advisors.

The *Forbes* “Best-in-State Wealth Advisors” list, January 16, 2020. Data provided by SHOOK™ Research, LLC. Data as of June 30, 2019. The *Forbes* “Best-in-State Wealth Advisors” ranking was developed by SHOOK Research and is based on in-person and telephone due diligence meetings to evaluate each advisor qualitatively, a major component of a ranking algorithm that includes: client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC and not indicative of future performance or representative of any one client’s experience. Rankings and recognition from *Forbes* are no guarantee of future investment success and do not ensure that a current or prospective client will experience a higher level of performance results, and such rankings should not be construed as an endorsement of the advisor. Neither *Forbes* nor SHOOK Research receives compensation in exchange for placement on the ranking. *Forbes* is a trademark of *Forbes* Media LLC. All rights reserved. For more information: www.SHOOKresearch.com.

Forbes “America’s Top Women Wealth Advisors” list, April 30, 2019. *Forbes* “America’s Top Women Wealth Advisors” ranking was developed by SHOOK Research and is based on in-person and telephone due diligence meetings and a ranking algorithm that includes: client retention, industry experience, review of compliance records, firm nominations; and quantitative criteria, including: assets under management and revenue generated for their firms. Investment performance is not a criterion because client objectives and risk tolerances vary, and advisors rarely have audited performance reports. Rankings are based on the opinions of SHOOK Research, LLC and not representative nor indicative of any one client’s experience, future performance, or investment outcome. Neither *Forbes* nor SHOOK Research receives compensation in exchange for placement on the ranking. *Forbes* is a trademark of *Forbes* Media LLC. All rights reserved. Rankings and recognition from *Forbes* are no guarantee of future investment success and do not ensure that a current or prospective client will experience a higher level of performance results and such rankings should not be construed as an endorsement of the advisor.

Barron’s “Top 100 Women Advisors” list, June 5, 2017. Advisors considered for the “Top 100 Women Advisors” list ranking have a minimum of seven years financial services experience and have been employed at their current firm for at least one year. Quantitative and qualitative measures used to determine the Advisor rankings include: client assets, return on assets, client satisfaction/retention, compliance records, and community involvement, among others. *Barron’s* does not receive compensation from Advisors, participating firms and their affiliates, or the media in exchange for rankings. *Barron’s* is a trademark of Dow Jones & Company, Inc. All rights reserved. The ranking or ratings shown here may not be representative of all client experiences because they reflect an average or sampling of the client experiences. These rankings or ratings are not indicative of any future performance or investment outcome and should not be construed as an endorsement of the advisor.

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