



Velociti
Financial Services

Velociti Financial Services: Enhancing Wealth through Goal-Based Value Creation

At Velociti Financial Services, we are committed to fostering great partnerships with our advisors and clients, driven by a focus on goal-based value creation. Our suite of services, including Velociti Investment Manager, Velociti Short term, and Velociti Life, is designed to align portfolios with client objectives, ensuring a collaborative journey towards financial success.

1. Great Partnerships:

Before embarking on the investment journey, we prioritize building strong partnerships. By shifting the investment process's focus towards client goals, both advisors and clients work congruently towards a common objective. We encourage advisors to base incentives on client goal achievement, fostering a collaborative and accountable partnership.

2. Communication:

Our goal-based value creation is rooted in effective communication. We create portfolios based on client goals, ensuring that critical decision points are transparently communicated. Regular updates and client-centric communication enable us to course-correct and rebalance portfolios in alignment with evolving client objectives.

3. Dedication:

We are dedicated to making clients asset-rich by actively managing portfolios to align with their goals. Through personalized overviews of clients' finances, we ensure that both investments and insurance align with their desired outcomes. This dedication aims to create long-term financial prosperity for our clients.

4. Support:

Identifying opportunities to solve advisory challenges, we leverage technology to enhance advisor and client outcomes. Personalizing client objectives, aligning them with a customized portfolio, and implementing necessary triggers and client-centric communication contribute to ongoing management and success.

How We Help Clients Become Asset Rich:

Velociti Score:

Our revolutionary Velociti Score utilizes technology to track and communicate clients' financial progress effectively. This score provides insights into four key financial areas—investments, life insurance, income protection, short-term insurance, and medical aid. Clients receive a score for each category, indicating how well they are positioned to meet their financial objectives. At Velociti Financial Services, we believe in a dynamic and collaborative approach that transforms financial journeys into success stories. Through technology-driven solutions and a commitment to goal-based value creation, we empower advisors and clients to achieve lasting prosperity.