



Velociti
Life

Velociti Life Overview

Welcome to Velociti Life, where our strategic partnerships with leading life insurance institutes redefine the landscape of financial security. Our unique structure and support system are crafted to assist financial advisors and clients in achieving goal-based value creation, ensuring a collaborative and personalized journey towards financial success.

Our Structure and Support System:

At Velociti Life, we've forged strategic alliances with renowned insurance institutes, creating a revolutionary approach to life insurance. Our structure is tailored to support advisors and clients alike, fostering goal-based value creation.

How We Assist Advisors:

- 1. Great Partnerships:** Redefining the life insurance process through strong partnerships, our approach aligns client goals with management processes, encouraging advisors to base incentives on achieving these objectives.
- 2. Communication:** Prioritizing goal-based value creation, we facilitate effective communication by conveying the client journey in easily understandable terms. Financial portfolios are crafted based on client goals, allowing for flexibility and proactive management.
- 3. Dedication:** Our dedication to making clients asset-rich is reflected in active financial portfolio management. Personalized overviews ensure investments and life insurance align with desired outcomes, creating a robust foundation for financial success.
- 4. Support:** Leveraging technology, we address advisory challenges by helping advisors personalize client objectives, align portfolios, and operationalize triggers for client-centric communication, ensuring ongoing management for personalized outcomes.

How We Assist Clients:

Achieving Asset Richness

Velociti Score: Our innovative Velociti Score utilizes technology to track and communicate clients' financial progress. This score provides a simple indication of their status across various financial areas. For example, if a client needs R5m life cover and currently has R2.5m, their Velociti Score in this category would be 50%, allowing for prioritization and improvement strategies.

Conclusion:

Velociti Life's partnership with diverse insurance institutes is built on the foundation of collaborative, goal-based value creation. We empower advisors and clients with innovative tools like the Velociti Score and personalized strategies to navigate the complexities of investment, ensuring a journey toward financial success. With Velociti Life, you and your loved ones are in capable hands, prepared for whatever life may bring.

Contact Us on

Lorraine Esau

Tel: +27 78 423 641

Lorraine.esau@Velocitilife.co.za