



Velociti

Group Holdings

Navigating

**YOUR FINANCIAL JOURNEY
WITH CLARITY AND PURPOSE**

COMPANY PROFILE 2024

REDEFINING FINANCIAL SERVICES FOR FINANCIAL ADVISORS AND THEIR CLIENTS.

OVERVIEW:

Velociti Group Holdings is a dynamic conglomerate comprising Velociti Life, Velociti Short Term, Velociti Financial Services, and Velociti Investment Managers. Dedicated to assisting financial advisors, we aim to redefine the financial services landscape by placing clients' goals at the core of our innovative solutions.

MISSION STATEMENT:

At Velociti Group Holdings, we are dedicated to helping financial advisors achieve and create goal-based value for their business and clients. Our mission is to redefine the way financial services are delivered, placing clients' financial goals at the heart of everything we do.

An investment in knowledge pays the best interest
Benjamin Franklin

SERVICES WE OFFER:

1. Velociti Investment Managers:

- A team dedicated to improving client outcomes.
- Focus on the vital role of advisors in achieving financial goals.

2. Velociti Life:

- Strategic partnerships redefining financial security.
- Goal-based value creation for financial advisors and clients.



3. Velociti Short Term:

- Unique advantages and a diverse range of services.
- Opening doors to a world of opportunities.



4. Velociti Financial Services:

- Fostering great partnerships with advisors and clients.
- Goal-based value creation as a driving force.





OUR APPROACH:

Velociti Group Holdings takes a truly client-led perspective on financial services, representing a fresh approach to the industry. Our focus is on helping clients achieve their financial goals, making their aspirations our top priority.

1

The Cosmos of Financial Services:

Charting a personalized trajectory for financial success.
Equipping clients with cutting-edge technology and a skilled crew of financial experts.

2

Enhancing Financial Services and Advice:

Elevating the world of financial services.
Simplifying the process of defining financial objectives and making healthier financial decisions.

3

Your Success Matters:

Beyond achieving financial goals, we focus on making your business efficient and sustainable.
Building a robust balance sheet and creating a rewarding succession plan.

4

Proactive Solutions:

Proactively assisting in achieving the right balance between assets and liabilities.
Empowering advisors to match the ideal investment portfolio to client risk tolerance.

5

Dedicated Support:

Offering dedicated support tailored to different financial journeys.
Making factors influencing the journey visible and manageable.

SUPPORTING ADVISORS:

Velociti Group Holdings recognizes the unique challenges faced by financial advisors. We are committed to filling gaps, enhancing capabilities, and ultimately benefiting both advisors and clients. Thriving advisors lead to thriving clients.



INTRODUCTION:

Velociti Life, where strategic partnerships with leading life insurance institutes redefine the landscape of financial security.

Our unique structure and support system assist financial advisors and clients in achieving goal-based value creation.

OUR STRUCTURE AND SUPPORT SYSTEM:

Strategic alliances with renowned insurance institutes.

Tailored structure supporting advisors and clients.

HOW WE ASSIST CLIENTS:

Achieving Asset Richness Through **Velociti Score**:

Innovative technology tracking and communicating clients' financial progress.

Velociti Short Term is an Authorised Financial Services Provider FSP 44456

HOW WE ASSIST ADVISORS:

1

Great Partnerships:

- Redefining the life insurance process through strong partnerships.
- Aligning client goals with management processes.

2

Communication:

- Facilitating effective communication based on goal-based value creation.
- Crafting financial portfolios aligned with client goals.

3

Dedication:

- Active financial portfolio management to make clients asset-rich.
- Personalized overviews ensuring investments align with desired outcomes.

4

Support:

- Leveraging technology to address advisory challenges.
- Helping advisors personalize client objectives and align portfolios.

Velociti Life's partnership with diverse insurance institutes is built on collaborative, goal-based value creation. Empowering advisors and clients with innovative tools, Velociti Life ensures a journey toward financial success.

WHY OUR SHORT-TERM STANDS OUT:

1 Access to Unmatched Binder Arrangements:

- Exclusive arrangements with prestigious insurers.
- Offering multiple insurance options without compromising claim and pricing assistance.

2 Trusted Advisor Relationships:

- Cultivating relationships with advisors specializing in short-term insurance.
- Broadening client base and enhancing service offerings.

3 Co-Ownership and Value-Added Products:

- Co-owning and co-building value-added products.
- Developing Velociti-branded solutions for clients.

4 True Independence:

- Access to over 28 different insurance providers.
- Offering precisely tailored short-term insurance solutions.

INTRODUCTION:

Elevate your financial advisory practice with Velociti Short-Term. Join us for unique advantages and a diverse range of services, opening the door to a world of opportunities.

OUR COMPREHENSIVE SERVICE OFFERINGS:

Personal Insurance, Commercial Insurance, Value-Added Products, Specialist Products.

OUR PARTNERS

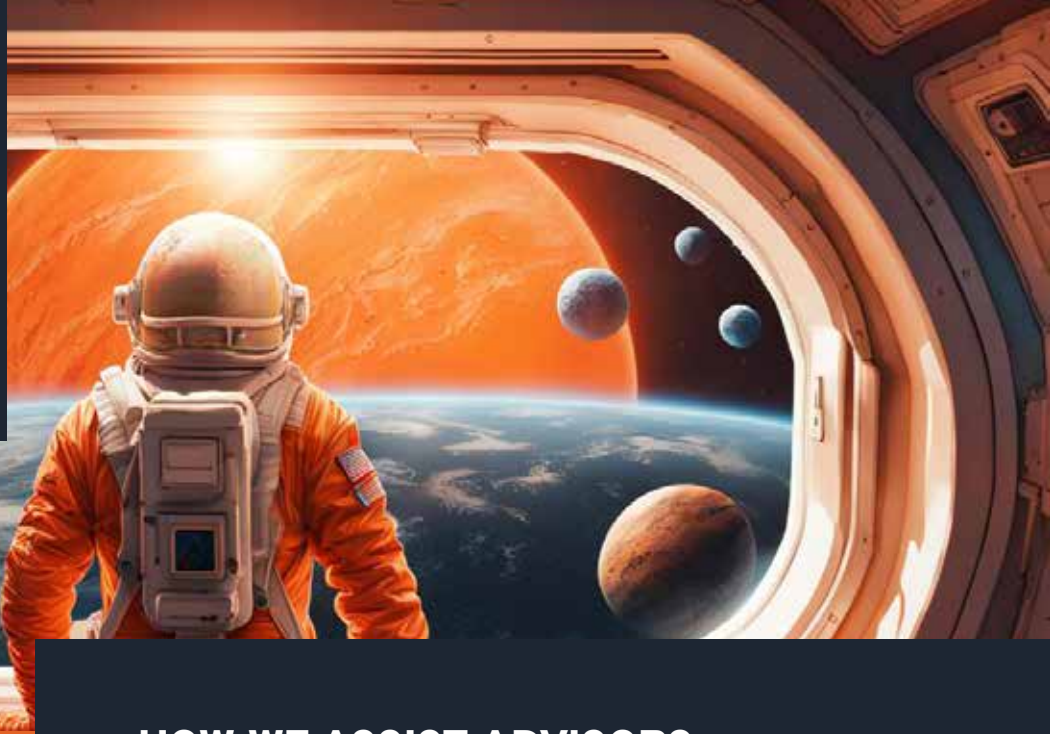


Velociti Short Term is not just a financial advisory opportunity; it's a platform for financial advisors to excel. Join us to elevate your business to new heights.



Velociti

Financial Services



INTRODUCTION:

Enhancing wealth through goal-based value creation, we forge strong partnerships with advisors and clients, focusing on goal-based value creation. Our services, including Velociti Investment Manager, Velociti Short term, and Velociti Life, aim to align portfolios with client objectives for a collaborative journey towards financial success.

HOW WE HELP CLIENTS BECOME ASSET RICH:

Velociti Score: Utilizing technology to track and communicate clients' financial progress effectively.

Velociti Financial Service (Pty) Ltd is an Authorised Financial Service Provider FSP 50026

HOW WE ASSIST ADVISORS:

Great Partnerships:

- Prioritising strong partnerships, we shift the investment focus to client goals.
- Advisors and clients collaboratively work toward common objectives, fostering accountability.

Communication:

- Our goal-based value creation relies on transparent communication.
- Portfolios are crafted based on client goals, with regular updates to align with evolving objectives.

Dedication:

- We actively manage portfolios to make clients asset-rich, ensuring alignment with their goals.
- Personalized overviews guarantee that investments and insurance match desired outcomes for long-term financial prosperity.

Support:

- Leveraging technology, we address advisory challenges and enhance outcomes.
- Personalizing client objectives, aligning them with customized portfolios, and implementing triggers contribute to ongoing management and success.

Velociti Financial Services believes in a dynamic and collaborative approach that transforms financial journeys into success stories. Through technology-driven solutions and goal-based value creation, we empower advisors and clients to achieve lasting prosperity.

THE TEAM

Tiaan De Jager

Velociti Group CEO:
Nearly a decade of dedicated service in the financial industry. Holds B Com Hons in Financial Management Sciences and Postgraduate Diploma in Investments.

Morne Rall

Head of Operations and Investment Support:
22 years of experience in the investment industry. Certified Financial Planner (CFP) with extensive qualifications.

Marc Thomas

Head of Velociti Investment Managers:
28 years in the asset management industry. Extensive experience in business and product development.

The Velocity Team brings a wealth of experience and expertise, driving innovation, client-centric solutions, and enduring success within the financial industry.

Redefining Financial services for Financial Advisors and Their Clients.

CONCLUSION

Velociti Group Holdings stands as a dynamic conglomerate, encompassing Velociti Life, Velociti Short Term, Velociti Financial Services, and Velociti Investment Managers. Our commitment is to redefine the financial services landscape by placing clients' goals at the core of innovative solutions. We dedicate ourselves to assisting financial advisors, focusing on achieving and creating goal-based value for their businesses and clients. Our client-led approach is evident in our mission to reshape the delivery of financial services, emphasising clients' financial goals as the nucleus of our operations.

Velociti Life forges strategic partnerships with leading life insurance institutes, reshaping the financial security landscape. With dedicated support and innovative tools, we empower financial advisors and clients in achieving goal-based value creation. Velociti Short Term offers unique advantages, including unmatched binder arrangements and co-ownership opportunities, elevating financial advisory practices. Velociti Financial Services, marked by strong partnerships and transparent communication, aligns portfolios with client objectives for a collaborative journey towards financial success. The Velocity Team, led by seasoned professionals, ensures innovation, client-centric solutions, and enduring success within the financial industry. Velociti Group Holdings is not just a financial services provider; it's a partner committed to navigating financial journeys with clarity and purpose.



"If you are passionate about people achieving their goals, they will choose you over the less passionate competition."

Don Connelly



Velociti
Financial Services

Contact

Tel: +27 74 624 5106
info@velocitifin.co.za



Velociti
Life

Contact

Tel: +27 78 423 6415
info@velocitolife.co.za



Velociti
Short Term

Contact

Tel: +27 78 423 6370
info@velocitinsure.co.za

WWW.VELOCITIG.CO.ZA