



Velociti

Financial Services

FINANCIAL SERVICES

GOAL-BASED VALUE CREATION



AT VELOCITI FINANCIAL SERVICES, WE ARE COMMITTED TO FOSTERING GREAT PARTNERSHIPS WITH OUR 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.

At Velociti Financial Services, we believe in a dynamic and collaborative approach that transforms financial journeys into success stories.

We have partnerships in place with some of our Insurance Partners

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

VELOCITI SCORE:

Our revolutionary Velociti Score utilises 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

HOW WE ASSIST YOU:

1

WE BELIEVE IN GREAT PARTNERSHIPS

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

2

PROACTIVE & EFFECTIVE 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

WE ARE DEDICATED

We are dedicated to making clients asset-rich by actively managing portfolios to align with their goals. Through personalised 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

PERSONALISED SUPPORT

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

OUR PARTNERS



JOIN US TODAY

Contact Us
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CONCLUSION

Through technology-driven solutions and a commitment to goal-based value creation, we empower advisors and clients to achieve lasting prosperity.

