



"We don't make investments for you...
We make the investments you make better."

Putting an end to the Frustration of Wealth Management

If you are here it is most likely because you have grown wary of the promises from the "expert" financial institutions. They promise to put you in control but then ask you to throw it over the wall and trust them. If you are like some, you have moved your assets from more than one institution to another in an effort to find a manager you can truly work with. You've listened to the pitches, the systems they'll provide, the level of detail they can provide, and every time... they fall flat. Every time you tried to make it work. Their systems are cumbersome, limited to short historical timeframes. Reports lack any ability to drill down for meaningful analysis. Certainly this is not the way you made your wealth in the first place!

Often when you buck a manager's advice to "stay the course," you learn your assets are locked up with penalties and restrictions. The managers make subtle inquiries about your family and personal interests (they want you to think they are more concerned about you than just holding on to your assets).

Something is not right. If you can manage a personal checking account with an off the shelf software package that provides more insight than what an actual financial institution allows you to see on the **products they have sold you** – there is something wrong.

When you use an Institutional Firm's systems are you effectively limited to a paper like report with no drill down capability? Could it be they don't want you to figure it out? Could it be that they want to make it so time consuming you won't bother? Could it be they want to make you depend on them? Do they want you to **trust but not verify**?

Veriloquent does not feel this is an acceptable level of service and more importantly an acceptable level of accountability with the very people you have entrusted with your wealth.

Open the Door to Veriloquent

There is another way... Veriloquent's focus is on analysis and informed decision making. This gives you an unique benefit since it means our relationship is not based on your assets under management but in delivering you financial intelligence on your assets wherever they may be invested. Our pricing is based upon the amount of analysis and research we perform or a predefined scope of work. Since we are compensated directly by you, it is never in our interest to cross sell you products – you will benefit by unbiased recommendations. You will benefit with pricing that is easily budgeted for and value based on the verifiable analysis we produce.

We are certainly seen as a disruptive business model by the traditional financial institutions since most of those institutions prefer to focus on lofty speak of investment strategies and lifestyle goals... and not their goals to annuitize and generate their own income off of your wealth. Disruptive to **them** is beneficial to you!

We are not for everyone, since your active participation is required. We offer you a way to make informed decisions without the constraints designed to make you "Stay the Course." Before you resign yourself to unacceptable frustrations... We have something you need to see.

Benefits of Our Approach:

- Veriloquent focuses on *analysis* not "assets under management." Veriloquent is not conflicted since Veriloquent receives no compensation of any kind from any financial institution. The benefit to you is unbiased advice, informed decisions, and the ability to take actions to protect your wealth.
- Veriloquent generates no commissions. Veriloquent's services are priced based upon the amount of data we analyze, so you can easily budget and measure the value of our insight and analysis. Isn't this the real definition of how a financial services industry should work? Veriloquent thinks so.



Only What you Need:

Veriloquent offers services based on tiered levels. You choose the level of engagement. Previously services like Veriloquent's were only available through a "Family Office." Access to a Family Office would typically require that you meet with a threshold net worth and that you subscribe to their services entirely. The benefit of Veriloquent's approach is that it allows you access to services like those of the Family Office, without the barriers of entry. Our services do differ in that we promote a "hands-on" partnership with our clients and of course, the direct benefit to you is that you decide what you need and want!

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