

# WEALTH MANAGEMENT FIRMS

## YOUR PARTNER IN GROWTH

“

WE ARE PLEASED WITH VERASOLVE'S DEVELOPMENT AND COORDINATION OF LEAD-GENERATING SEMINAR EVENTS WHICH HAVE RESULTED IN VALUABLE LEADS AND NEW BUSINESS. THE INVITATIONS, MESSAGING, AND MAILING LISTS PUT TOGETHER BY THE VERASOLVE TEAM GENERATED HIGH ATTENDANCE RATES AND ATTENDEE QUALITY. IN FACT, IN EACH CASE THE SEMINARS WERE OVERSUBSCRIBED AND WE NEEDED TO ADD ADDITIONAL DATES TO SATISFY DEMAND.”

—PATRICK CARROLL, CFP®, FOUNDER, PRINCIPAL, WEALTH STRATEGIES GROUP



**verasolve**  
Building Stakeholder Value™



# GROWING YOUR AUM

Verasolve has successfully managed hundreds of seminar programs for dozens of wealth management firms across the country. We have spent the last ten years developing, refining, and implementing public relations and marketing strategies and tactics that are proven to increase a wealth management firm's assets under management (AUM) by tens of millions of dollars each year. Your firm is an ideal candidate for our tried-and-true process if it meets the following criteria:

- You are an independent Registered Investment Advisor (RIA) or an independent broker-dealer
- Your current AUM is between \$200 million and \$3 billion
- You target high-net-worth individuals with more than \$1 million in investable assets
- Your client retention is 90 percent or better
- Your team includes multiple advisors



I'D LIKE TO EXPRESS HOW PLEASED I AND MY FELLOW CO-FOUNDERS HAVE BEEN WITH THE VERASOLVE TEAM'S WORK FOR XML FINANCIAL GROUP THUS FAR. BOTH THE PROSPECT AND RECRUITING EVENTS YOU AND YOUR TEAM EXECUTED FOR US WERE VERY SUCCESSFUL, RESULTING IN NUMEROUS QUALIFIED PROSPECT LEADS AND FINANCIAL ADVISORS FOR OUR FIRM."

—BRETT BERNSTEIN, CFP®, CO-FOUNDER, XML FINANCIAL GROUP



I WANT TO EXPRESS MY APPRECIATION FOR YOUR TEAM'S EFFORTS OVER THE LAST THREE YEARS IN HELPING HIGHLINE DOUBLE OUR ASSETS UNDER MANAGEMENT TO OVER \$1 BILLION. THE COMBINATION OF YOUR PR EFFORTS AND DEVELOPMENT, COORDINATION AND IMPLEMENTATION OF A PENTA-MILLIONAIRE LEAD GENERATION EFFORT, AND EVENTS HAVE BEEN OUTSTANDING."

—NEAL SIMON, FOUNDER & CEO  
HIGHLINE WEALTH MANAGEMENT

## DELIVERING QUALIFIED LEADS

Verasolve provides the methodology to greatly expand your prospect pool beyond referrals. During the length of your engagement, Verasolve works with only one wealth management firm within a discreet set of zip codes. We custom build proprietary mailing lists designed to fill seminars with high-net-worth individuals with more than \$1 million in investable assets who have experienced an inflection point—a liquidity event, generational transfer, or divorce—or are dissatisfied with their current wirehouse or stock broker.

## INCREASING CLOSING RATIOS

Verasolve develops and implements public relations and marketing initiatives—press releases, bylined articles, interviews, awards, website copy, social media updates, event invitations, brochures, and more—that not only increase the number and quality of seminar attendees, but also help you get follow-up meetings with them. Verasolve works with you to craft and convey a strong value proposition that increases closing ratios by differentiating you from the competition, demonstrating your financial expertise, and showcasing your role as trusted advisor.

## ENHANCING BRAND RECOGNITION

Verasolve has placed articles and earned media coverage in major news outlets, including *The Washington Post*, *The Wall Street Journal*, *Forbes*, *NBC News*, *CNBC*, *Kiplinger*, *American Business Journal*, *Financial Advisor Magazine*, *Investment News*, *Bloomberg*, *Businessweek*, *The Deal*, *CFO*, *SmartCEO*, *Financial Executive*, *Reuters*, *Fast Company*, *Entrepreneur*, and *Voice of America*.



# ABOUT VERASOLVE

For more than ten years, Verasolve has partnered with dozens of wealth management firms to provide cost-effective solutions that generate qualified leads, increase closing ratios, and enhance brand recognition. We focus on **Building Stakeholder Value™**. Our tried-and-true seminar programs and customized public relations and marketing strategies are certain to increase your AUM by tens of millions of dollars each year.

Verasolve offers a variety of comprehensive services to fulfill your unique branding, marketing, and public relations needs at one-quarter to one-third the cost of traditional options. Our virtual presence in your business allows us to operate as part of your team without the pressure of a long-term contract. We give you the freedom to determine the length of your engagement with the flexibility to discontinue with only two weeks' notice. Our experience and expertise allow us to deliver consistently outstanding results that help take your firm to the next level and increase your AUM by tens of millions of dollars each year.



VERASOLVE'S INVOLVEMENT LED TO INCREASED EVENT ATTENDANCE AND HELPED HARDESTY CAPITAL MANAGEMENT SECURE VALUABLE BUSINESS LEADS. THE VERASOLVE TEAM'S WORK HAS INTEGRATED SEAMLESSLY INTO OUR MARKETING AND BUSINESS DEVELOPMENT EFFORTS."

—STEVE SHEA, PRESIDENT, HARDESTY CAPITAL MANAGEMENT



WE REALLY VALUE THE EXTENSIVE EXPERIENCE YOU HAVE BROUGHT TO OUR EFFORTS IN THESE AREAS BEGINNING WITH THE DEVELOPMENT OF AN INTEGRATED MARKETING PLAN THAT HELPED IDENTIFY THE CLIENT SEGMENTS WITH THE GREATEST OPPORTUNITIES FOR GROWTH."

—PATRICK CARROLL, CFP®, FOUNDER, PRINCIPAL WEALTH STRATEGIES GROUP





“ THE EVENTS YOU HAVE DEVELOPED FOR US HAVE RESULTED IN LEADS AND ARE HELPING OUR FINANCIAL ADVISORS CLOSE VALUABLE BUSINESS. THE INVITATIONS, MESSAGING, AND MAILING LISTS YOU PUT TOGETHER HAVE ALSO IMPROVED OUR ATTENDANCE RATE AND ATTENDEE QUALITY COMPARED TO PREVIOUS EVENTS WE HELD PRIOR TO OUR ENGAGEMENT WITH VERASOLVE. WE REALLY VALUE THE EXTENSIVE WEALTH MANAGEMENT EXPERIENCE YOU BRING TO OUR EFFORTS IN THESE AREAS.”

—STEPHAN CASSADAY, CFP®, CFS  
FOUNDER, PRESIDENT & CEO  
CASSADAY & COMPANY, INC.

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“ WE HAVE FOUND YOUR TEAM'S KNOWLEDGE OF THE INDEPENDENT WEALTH MANAGEMENT INDUSTRY TO BE UNPARALLELED AMONG MARKETING AND PUBLIC RELATIONS PROFESSIONALS WE HAVE COME ACROSS IN THE PAST.”

—BRETT BERNSTEIN, CFP®, CO-FOUNDER, XML FINANCIAL GROUP

## AFFORDABLE SERVICES

As the premier provider of virtual marketing and public relations services, Verasolve helps wealth management firms increase their AUM by delivering qualified prospects and increasing closing ratios at one-quarter to one-third the cost of traditional options.

## FLEXIBLE CONTRACT AGREEMENTS

Our flexible engagements give you the freedom to engage and disengage our services at any time with just two weeks' notice.

## FAST, EFFECTIVE RESULTS

Verasolve consistently delivers fast, effective results. We might be virtual, but we're very visible. You'll soon find us to be an indispensable part of your team.

## COMMITMENT TO YOUR SUCCESS

Verasolve understands the challenges faced by wealth management firms. We help you communicate your value proposition—to the right people in the right way—so that you can achieve your revenue goals. We even have experience helping our clients recruit financial advisors. Whatever you aspire to, we are committed to your success.

[www.verasolve.com](http://www.verasolve.com)