

# VERA:

THE LATIN WORD FOR TRUE, GENUINE, FAIR, AND PROPER



## THE NEW YORKER

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“When it comes to financial matters, many Americans have been left without a clue. The financial markets have become a dizzying emporium of choice... The decisions are more numerous and complex.”

### WE BEGIN WITH THE BASICS



BUDGETING



FINANCIAL PLANNING



INVESTMENTS



INSURANCE



ESTATE PLANNING

### HOW WOULD YOUR EMPLOYEES ANSWER THESE QUESTIONS?

YES

NO

1. Would you like help reducing your monthly expenses?		
2. Would you like to know if you are saving enough for retirement?		
3. Would you like to know if your investments have the potential to generate the returns you will need to achieve your goals?		
4. Would you like help planning for future college expenses?		
5. Would you like help regaining control of your finances?		

**For a fixed fee, your employees will have access to a Vera Advisor who will examine their complete financial situation, present a detailed plan and meet with them every six months to ensure progress toward their goals.**

### WHY VERA?

Improve employee morale

Increase productivity

Reduce employee stress

Increase retention

Higher benefits participation

Custom solution for each employee

Flexible Benefit Structure

70% less than other providers



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