



VÉRITÉ

TRUTH AND TRANSPARENCY



HOW VÉRITÉ
DIFFERENTIATES
ITSELF

HOW VÉRITÉ DIFFERENTIATES ITSELF

1 A SINGULAR FOCUS ON A COMPLEX TRANSACTION

Our business is to ensure that you and your client have an experience that exceeds your expectations. We feel that this can only be achieved by a firm-wide focus and dedication to Premium Finance.

2 UNBIASED APPROACH

While we have designs that have proven successful, we go into each project with an open mind and come out with a customized plan. Our product experience is inclusive of Whole Life, Indexed Universal Life, and Universal Life.

3 PRIORITY ACCESS TO BANKS

Our volume affords us superior pricing and response time similar to how you may get priority access to the insurance company underwriters. Our platform gives us access to 10+ banks at any given time.

4 EXPERIENCE WITH THE PROFESSIONAL ADVISORS OF YOUR CLIENTS

These cases typically involve interaction with your client's accountant and/or attorney. Vérité's founder built his insurance practice by servicing this community and we can add value in these discussions.

5 RENEWAL PLATFORM

The most overlooked aspect of Premium Finance is the ongoing maintenance. You will have a dedicated case manager that will work with you, your client, and their team to ensure ongoing success. Our case design will set us up for success and ensure that the correct expectations are set at the onset.

6 PRESENTATION

By working with us, you will get access to best-in-class presentation software that will impress even the most analytical client(s). Our software includes a Premium Finance overview, historical data, and comparisons to a non financed policy (IRR, Cash Value, Death Benefit, Retained Capital).

7 JOINT MARKETING

Have you considered taking an industry expert to your Centers of Influence to generate more business and client referrals? We have found success in educating professional advisors and generating interest and opportunity from these meetings.

8 WE ARE A TEAM

Our organization includes professionals with a focus on each layer of these transactions. You will have support in sales, bank management, case design, and ongoing service.

9 LEVERAGE WITH THE CARRIERS

Do you understand the process to get a premium financed case through underwriting at the carrier level? We are approved with many of the major insurance companies and our expertise in dealing with them will give you the highest probability of a successful close.