

# Velorum

*The Affinity Velorum™ Service is designed for those that aspire to become Genus clients but who for whatever reason do not quite meet the criteria.*

Our Velorum clients usually prefer a more reactive rather than proactive service from us. Typically, this would include Genus Client family members such as their Children and main beneficiaries or those with less than £250,000 of initial investible assets.

The core features of this service include:

- Reduced Initial Planning Fees
- Reduced Ongoing Services Fees
- Production of your own personal Affinity Pure™ and/or Pension Checker™ advice reports
- Simplified technology driven investment and pension solutions
- Standard Integrated Ongoing Services™ all delivered remotely
- Reactive Planning only; we will not provide any Proactive ongoing financial planning support unless specifically requested to do so
- Face to Face Progress and Review Meetings can be arranged subject to a separate fee agreement
- Discounted New Advice Event.