

916.358.5635

VERIPAX WEALTH MANAGEMENT

Thank you for visiting our website. Veripax Wealth Management, LLC is an independent wealth management firm located in Folsom, CA. As an independent firm we are under no pressure to recommend any particular company's investment products, which allows us to work as each client's Chief Financial Officer. We are passionate about helping individuals and small businesses reach their financial goals, and we love what we do. Because of this we are often accused of being geeks, but that's OK with us.

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VERIPAX APPROACH TO WEALTH MANAGEMENT

Fiduciary Commitment: When clients invite us into their financial lives, it is both an honor and an incredible responsibility. Being a “fiduciary” means that we always put client interests before our own, and we believe this goes beyond following a set of compliance rules. Being a true fiduciary comes from a deep desire to want to do what’s best for clients. Putting clients first leads to long-term, satisfying relationships, which is why we are in the wealth management business in the first place.

Identifying the Mission: Yogi Berra once said, “If you don’t know where you’re going, you’ll end up someplace else.” Every wealth management engagement must begin with identifying the mission, or the objective that needs to be accomplished. The objective will determine our strategy, not the other way around.

Wealth Management Strategy: We find that it helps to think of a financial strategy in terms of “offense” and “defense.” The offense part is the strategy for making steady progress toward the objective. This will typically involve investment choices that are aligned with your goals, protection or hedging strategies, social security planning, determining the best time to sell a business or a house, etc. The defensive strategy involves identifying and addressing risks that could derail the plan or mission. In this part of the strategy we deal with long-term care needs, proper life insurance coverage, medical insurance choices, disability, and anything else you are we can think of.

We believe that everyone benefits from “wealth management,” which is an approach that goes beyond simply choosing the best investments. We strive to build and implement strategies that accomplish your financial mission with a level of risk that you are comfortable with. This means a focus on risk-management, and a strategy that makes sure all financial actions are done on purpose.

CONTACT VERIPAX

Get in Touch with Veripax Wealth Management Today. [Send us an Email](#) or call today.

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Clients: Client Access



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