

BRINGING IT ALL TOGETHER

Peace of mind from thoughtful planning and execution

► OUR SERVICES...

Financial advice is more than just investment advice

Investments are an important part of what we do for our clients, but financial advice is far more than just investments.

At Valeo, we focus on a client's *entire* financial picture including insurance, taxes, cash flow, educational funding, retirement, and estate planning. As a result, we strive to provide peace of mind that can only come from knowing all aspects of your financial life are working well together.

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01. Individuals

Learn how we integrate all financial areas of your life, such as taxes, estate planning, education funding and investments. There is an advantage to working with Valeo.



02. Institutions

The Institutional Team at Valeo works with company-sponsored retirement plans, foundations and endowments to design and manage their investment portfolios.



03. Team

Our people are our most important asset, and developing their talent is a critical component of our mission.



01. Are you a fiduciary?
02. Where are my investments held?
03. Where do you service clients?
04. Can you manage my company's retirement plan?

Stocks Rise to New Highs and a Strong Jobs Report in the Weekly Market Update by Valeo Financial Advisors (July 6, 2019)

JULY 6, 2019

The week began with President Trump becoming the first sitting U.S. President to enter North Korea in a Sunday...


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Temporary Truce in Trade Talks at G-20 Summit, Heightened Tensions with Iran, and Additional Border Funding this Week in the Weekly Market Update by Valeo Financial Advisors (June 29, 2019)



@ValeoFinancial

MARCH 23, 2018

The Supported 16 Round of Brackets For Good ends tonight at 8:00pm! Get in the game at <https://t.co/uChtzUSx4t> and help your favorite nonprofit(s) advance before it's too late. #BFGIndy #BFGIndiana 

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President Xi as the U.S. agreed...

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