Innovations

Advisor Tools for Helping Clients Arrive at a Brighter Future

Every broker-dealer offers a variety of products and services. But do they add value? Are they truly mapped to your individual client goals?

Over the last decade and a half, Valmark Member Firms have worked collaboratively with our internal experts to create unique processes that demonstrate how options compare and fit clients' personal goals.

These processes often came about because of product or regulatory changes that required a new way of looking at things, be it the advent of Exchange Traded Funds (ETFs), the development of a secondary market for life insurance policies, or adjusting offerings to comply with the Department of Labor Rules.

Today, Valmark Member Firms can call on a team of 100+ service professionals who are hands on and ready to assist, helping them find the best solution for their clients' needs and get the most out of these innovative tools.

Wealth Management Tools	Wealth Transfer Tools

Achieving Retirement Clarity™ (ARC)

Focused Planning™

Comprehensive Annuity Review and Evaluation

Service™ (CARES)

The Optimized Portfolio System® (TOPS®)

The Retirement Income Survival Kit™ (RISK)