

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)**



VALMARK
FINANCIAL GROUP®

MENU

OUR STORY

SERVICES

MEMBER FIRMS

INNOVATIONS



CONNECT

MEMBER LOGIN

CAREERS

NEWS

SOCIAL

LINKEDIN

TWITTER

YOUTUBE

FINRA BROKER CHECK

Securities offered through Valmark Securities, Inc. Member FINRA/SIPC. Investment advisory services offered through Valmark Advisers, Inc., a SEC Registered Investment Advisor.

130 Springside Drive, Akron, Ohio 44333. (800) 765-5201. FINRA | SEC | SIPC | MSRB |

©2016 Valmark Financial Group | All rights reserved.

Website Development: **MONSTERS Unlimited**

