Verity Asset Management's Retirement Plan Services

At Verity, we offer turnkey solutions that are cost-effective and include all aspects of a full service retirement plan. Plan Sponsor services include scheduling and coordination of all participant education, enrollment meetings, one-on-one sessions, and an annual plan and compliance review in conjunction with the plan custodian and administrator. We offer a full program of support in meeting your fiduciary responsibilities.

"In this challenging and sometimes confounding world, we are first and foremost in the business of providing solutions…"

Employees seeking help with investment choices can utilize our actively managed models or seek advice and guidance directly from our Investment Advisor Representatives.

"We are adaptive: when conditions change, we respond."

We offer your employees professional investment advice and work to assist them in meeting their financial goals. We offer a truly active management style that is based on an individual's risk tolerance. Constantly monitoring both risk and potential reward, we work to over-weight the odds of success while limiting the downside.

"We are investors, not speculators."

Fiduciary & Plan Services

As named fiduciary, Verity can assume all fiduciary functions:

- Acknowledge accountability in writing
- Provide plan-level investment advice
- Select plan investments options
- Create and maintain Investment Policy Statements
- Monitor investment options and suggest replacements when appropriate

Independent Advice

Traditionally, the money management services of investment advisory firms have not been available to retirement plan participants. Through an innovative set of business processes, Verity has overcome the traditional barriers involved in delivering active account management services to participants.

Participant Education/Advice

In addition to group participant education and enrollment meetings, our advisors are available to offer investment advice and financial planning through on-site individual meetings, or by phone and email. Our Actively Managed Models allow participants to enroll in a service that provides professional money management on a discretionary basis, regardless of account size.

Active Management

Using a broad tactical asset allocation methodology, we work to effectively diversify your investments using the investment options available within your retirement plan. Our monitoring and trading platform integrates directly with Wilmington Trust, offering participants a unique opportunity to benefit directly from independent active management within their retirement accounts.

An Advisor That Never Stops Thinking

Understanding that sound principles are vital, yet change is a constant, we continually reassess not just our individual investment decisions, but our process as well. We are adaptive: when conditions change, we respond. And we are relentlessly innovative: we don't wait for solutions; we create them.

About Verity

Founded in 1996, Verity Asset Management focuses on the delivery of a high level of investment planning and account management to retirement plan participants at corporations, non-profits and educational institutions of all types. With an investment advisory process that integrates the product offerings of open architecture platforms such as Wilmington Trust, we provide elective advisory services to retirement plan sponsors and participants at institutions and corporations that permit advisor integration. To find out more about how Verity can produce meaningful results for you, please call:

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Independent Thinking. Meaningful Results.