Active Management For Your Workplace Retirement Account

A Superior Offering

Traditionally, the money management skills of investment advisory firms have not been available to 403(b) plan participants. There are a number of reasons for this, including barriers to entry, smaller average account sizes and significant operational hurdles that can hamper the efficient management of individual accounts.

Through an innovative set of business processes, Verity has overcome these impediments, providing you with access to a solid, well founded investment approach that has generally been reserved for institutions and affluent individuals.

A Reality-Based Approach

Attentive to the primary themes of investment theory and aware of the long-term lessons of market history, we continually assess current global economic and market conditions in search of a favorable course for the present environment. Our central objective is to effectively grow your capital at a less erratic and volatile pace than domestic equity markets.

Utilizing a broad tactical asset allocation methodology, we work to diversify your investments across multiple weakly-correlated asset classes. In the process, we seek an advantage by favoring market segments that demonstrate legitimately attractive valuations or definable trends.

We are investors, not speculators. Considering risk and potential reward, we work to plot a course that over-weights the odds of success while limiting the probability of loss; we evaluate the potential liabilities of our chosen course; and we make adjustments to reduce downside risk.

Independent Advice

We are guided by one primary focus: deliver effective investment decision making for our clients, now and at all times. To achieve this objective, Verity places the highest value on integrity, intellectual honesty, the relentless pursuit of a deeper understanding and the unending search for a better way. Our investment choices are always based on serving your best interests – and no one else’s.

Active Management

When attempting to make good decisions in a complex and constantly changing environment, we know that we can never afford to stop thinking. Broad market parameters change over time, making it impossible to achieve success by forcing any system through an environment for which it is not well suited. One must proceed from an understanding of reality as it is, rather than as hoped for: to get where you want to go, it may be important to know which direction is north, but to get there safely, it is also important to recognize when there may be a raging storm directly in your path.

Therefore, our investment committee meets regularly to analyze current conditions, challenge the validity of our assumptions and keep our course tracking toward your objectives.

Participant-Driven Solutions

When we think of our investment process, we think first of people. And when we think of people, we think in terms of each, not all. We are driven by the conviction that our role is to contribute to your financial well being not simply with good intentions, but with a careful plan for achieving a meaningful result. With your goals as our clear target, we manage for probability, not performance. As performance is unpredictable, it is vitally important that the people who manage our process be more focused on maximizing the probability of your success than on merely meeting abstract performance goals.

An Adviser 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 superior level of investment planning and account management to retirement plan participants at educational institutions of all types, including universities, teaching hospitals, community colleges and local school systems. With an investment advisory process that integrates the product offerings of TIAA-CREF and Fidelity Investments, we provide elective advisory services to retirement plan participants at institutions that permit advisor integration. To find out more about how Verity can produce meaningful results for you, please call 800.247.6717, extension 105.

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Independent Thinking. Meaningful Results.