How to Tell Real Advice from a Sales Pitch. A short guide to protecting your financial future (and your peace of mind).

1.

Real Advice Starts With Your Goals. A Pitch Starts With Their Products.

When you're getting real advice, the first conversation is about *you*.
Your goals, your concerns, your values.

If the conversation quickly turns to *what they offer* (insurance, funds, or "exclusive" investment products) you're not being advised. You're being sold.

Gut check: If you feel like you're being led somewhere you didn't ask to go, you probably are.

2.

Real Advice Doesn't Require a Purchase.

If the "advice" only makes sense *if you buy something*, that's a red flag.

You should leave any conversation with better clarity whether or not you say yes to anything.

Test this: Ask, *"What would you recommend if I didn't become a client?"*
Real advisors will still have answers.

3.

Real Advice Discloses How They Get Paid.

If the person across from you can't explain, clearly and without hesitation, *how they're compensated and by whom*, you're not getting advice. You're entering a sales funnel.

Watch out for lines like:
- "We're paid by the companies we work with."
- "There's no direct cost to you."
- "It's all included."

Look for: Fee transparency, not smoke and mirrors.

Keep in mind: Advisors trained in conflict-heavy environments — which includes nearly every firm but ours — often think they're helping, even when their advice serves someone else's bottom line.

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4.

Real Advice Includes the Downsides.

If all you're hearing is upside, run.

Good advice includes risks. Trade-offs. What might go wrong. A salesperson downplays those because they want the deal to move fast.

Ask this: *"What's the downside?"*
If they don't have one, they're either not being honest or they don't understand it themselves.

5.

Real Advice Doesn't Care If You Buy.

The best advisors are built on trust, not transactions.

They're okay with "not right now" because they're not trying to win your money. They're trying to win your trust.

Why We Built Verecan This Way

At Verecan, we saw too many people being "advised" by sales reps with quotas.
So we built something different.

We're registered Portfolio Managers. That means legally required to act in your best interest. At Verecan we're also structurally designed to eliminate the usual conflicts. No commissions. No kickbacks. No pressure to buy anything, ever.

We believe that when advice is truly aligned with your goals, it becomes a competitive advantage. So we made it our business model.

Want to experience what real advice sounds like?

We offer **30-minute conversations with licensed Portfolio Managers**.
No pitches, no pressure, no cost.
Walk away with better questions, clearer thinking, and a bit more peace of mind.
Whether we're the right fit or not.

BOOK YOUR CALL

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