

Advisor Testimonial

What are people saying?



Vi4
WEALTH



*B&B Strategic Management Owner-Advisor
shares her experience with Vi4 Wealth Visualize*

Janet G.

While I was hesitant to add yet another piece of technology to my practice, I decided to give Vi4 Wealth Visualize a try.

The client feedback has been both positive and increased revenue. After seeing the video report, here are responses from two clients.

Client 1: *"Wow - there was a lot of volatility this year"*

Result: Bringing in a new outside account valued at \$250,000 to be invested in a way that comforts her fear of market volatility.

Client 2: *"I see the account has done well; I need to give you more money!"*

Result: Set up regular reoccurring deposits plus a new account transfer of \$60,000.

Who is Janet G.?

MSPFP, CFP®, CDFA®,
ChFEBCSM

Janet has a robust foundation in financial planning and is dedicated to guiding clients through their financial journey

