



OPUS

WEALTH STRATEGIES, LLC

GetOpusWealth.com

5WS

Functional, Personalized Financial Education Provided in Service to Special Forces and Military Command Units Across the Nation

WHO

Opus Wealth Strategies, LLC (OWS) was founded by Danijel Velicki. He is passionately committed to teaching fundamental financial concepts to military personnel, who often need it more than most. He has over 17 years of experience in the financial industry and has been working with the SEAL, EOD and Special Forces communities since 2008. The OWS team includes several Naval Special Warfare retirees who are benefitting from these concepts and now share the same vision as Danijel.

WHERE

We come to you. We're working with your CO or XO to determine a convenient on site location that will allow you to attend with ease, and also provide the appropriate environment for a dynamic, two-way dialogue. We'll bring some hands-on learning materials to help drive the conversation and will use a whiteboard or something similar to effectively illustrate our main ideas.

WHAT

This is not a sales presentation. We are here to serve. We deliver a 50-minute classroom style presentation, where questions and engagement are not only welcome, but encouraged. This is the time to ask those financial questions that have kept you up at night, but you weren't sure who to trust with the information. We've prepared relatable takeaways and action items that you can immediately implement in your daily living to better achieve your personal financial goals.

WHY

This drives to the heart of our mission at OWS - Educate. Empower. Equip. We believe that you deserve to have the information available to confidently make all of the financial decisions which life requires of you, especially as our forward deployed military personnel and for your families. The key is to get this information to you as a service member before you face major life decisions - such as purchasing a home or a vehicle, investing, saving for college or understanding and navigating the new BRS. This educational presentation is designed to enhance your operational readiness by fortifying financial preparedness and stability, so as to remove unnecessary distractions and stress. We are honored by the opportunity to bring financial knowledge and peace of mind to you, our military, and your families.

WHEN

Your CO or XO is working with us to choose the best time of the week where we can maximize your involvement without compromising your schedule or workload. We know how busy you are and want our presence on site to add value to your day. Additionally, we understand the importance of including spouses in this crucial conversation wherever possible, so often coordinate evening meetings so they may attend as well. Please look to your CO or XO for more information as they secure a date/time that is a best fit for you.



*Danijel has always provided crucial support and genuine interest in my financial success. Military life is filled with complex decisions, ever-evolving life circumstances and challenging unknowns. I've found myself stationed all over the world over the course of the past several years, and Danijel has kept pace every step of the way. His accessibility is a constant reassurance and he's provided the thoughtful insights I've needed to make sure my personal finances are well-managed and my family is well-protected, both today and tomorrow." **

- DR. TOM P.,
LIEUTENANT COMMANDER
UNITED STATES NAVY

* Non compensated client testimonial; may not be representative of all client experiences; no guarantee of future performance or success.

DANIJEL VELICKI, CFS, CIS
SENIOR PARTNER & FOUNDER



Industry leader and financial educator, Danijel Velicki, has successfully crafted a professional empire that revolves around a cutting edge dialogue and personalized curriculum designed to equip and empower his clients to powerfully thrive across all facets of life.

Consistently achieving top merits in the financial and insurance services arena, Velicki has made it his life's goal and mission to educate and equip his clients, upcoming leaders and entrepreneurial visionaries with the tools and insights that serve as the keystone to his success in both the public and private sectors. Beginning his career in 2000 at Duke Stein & Co., he earned New Agent of the Year within his first twelve months of business, and later went on to earn Agent of the Year for the next three years running.

He was then awarded the Gold Presidential Citation Award for Management and Executive Club by Guardian Life Insurance Company/Park Avenue Securities and then qualified for the Leaders Club and Blue Chip Council at Massachusetts Mutual Life Insurance Company. After joining Stephens Financial Partners in 2007, Danijel then moved on to start The Opus Group of Virginia in 2010, later renaming the company to Opus Wealth Strategies, LLC in 2017 when the company expanded to offer nationwide services.

Whether working with the United States Navy SEALs or regional hospitals and medical staff, Velicki's exceptional commitment to his clients and his community are reflected in his genuine interest, functional education and top notch customer service. Velicki designed both his financial curriculum and process management with a service over sales approach that is fundamentally grounded in life skills, personalized partnership and a thorough understanding of the complex issues that individuals, companies and families are facing across today's financial climate.

A devoted family man, Danijel spends his free time with his wife, Melissa, and their three children, Maja, and twins, Ella and Noah. When not spending time with family on their summer vacations to his childhood home in Croatia, they can all often be found at his local gym, Crossfit Chesapeake, encouraging individuals and families to pursue physical health and wellness.



*Danijel recently delivered a financial brief to our command unit and I have to say, he came through on every promise to provide actionable insights, functional knowledge and life-changing takeaways that our sailors could immediately apply to their daily living and future success. We've had other presenters on site, and always felt their presentations leaned more into selling their products and less into serving our military personnel. Danijel arrived with a clear commitment to educate and serve, and we continue to receive positive feedback and gratitude from our unit as a result of having him on site to equip them with the tools and resources they need to confidently navigate military life while also achieving their personal financial goals.**

- JIM F.,
MASTER CHIEF, NAVY SEAL, TRADET

* Non compensated client testimonial; may not be representative of all client experiences; no guarantee of future performance or success.