

# VIRTUAL ASSISTANCE





WOW CLIENTS WITH  
YOUR SERVICE!



Provide exceptional client service and care without hiring an in-office assistant!

It can be difficult to manage the time-consuming administrative aspect of your business while still satisfying client expectations. If you are looking for administrative support but want to minimize cost and maintain scale, we have the solution: consistent and reliable admin support.

## WHAT TO EXPECT

-  No salary or employee related taxes to pay
-  Experienced administrative support with systems and process knowledge
-  No extra office space or equipment charges
-  Client satisfaction through exceptional client service

## OUR SERVICES

- ✓ Open and maintain client accounts
- ✓ LPL Account View and Wealth Vision setup
- ✓ Schedule appointments, make and return calls
- ✓ Audit preparation and follow-up
- ✓ Maintain client account data in CRM
- ✓ Client meeting preparation
- ✓ Resolve account notifications and items not in good order