Advisor Assistance Made Simple

Helping you streamline your day-to-day business operations so you have more time to meet, teach, learn, stabilize, and grow your business.

REGISTER NOW

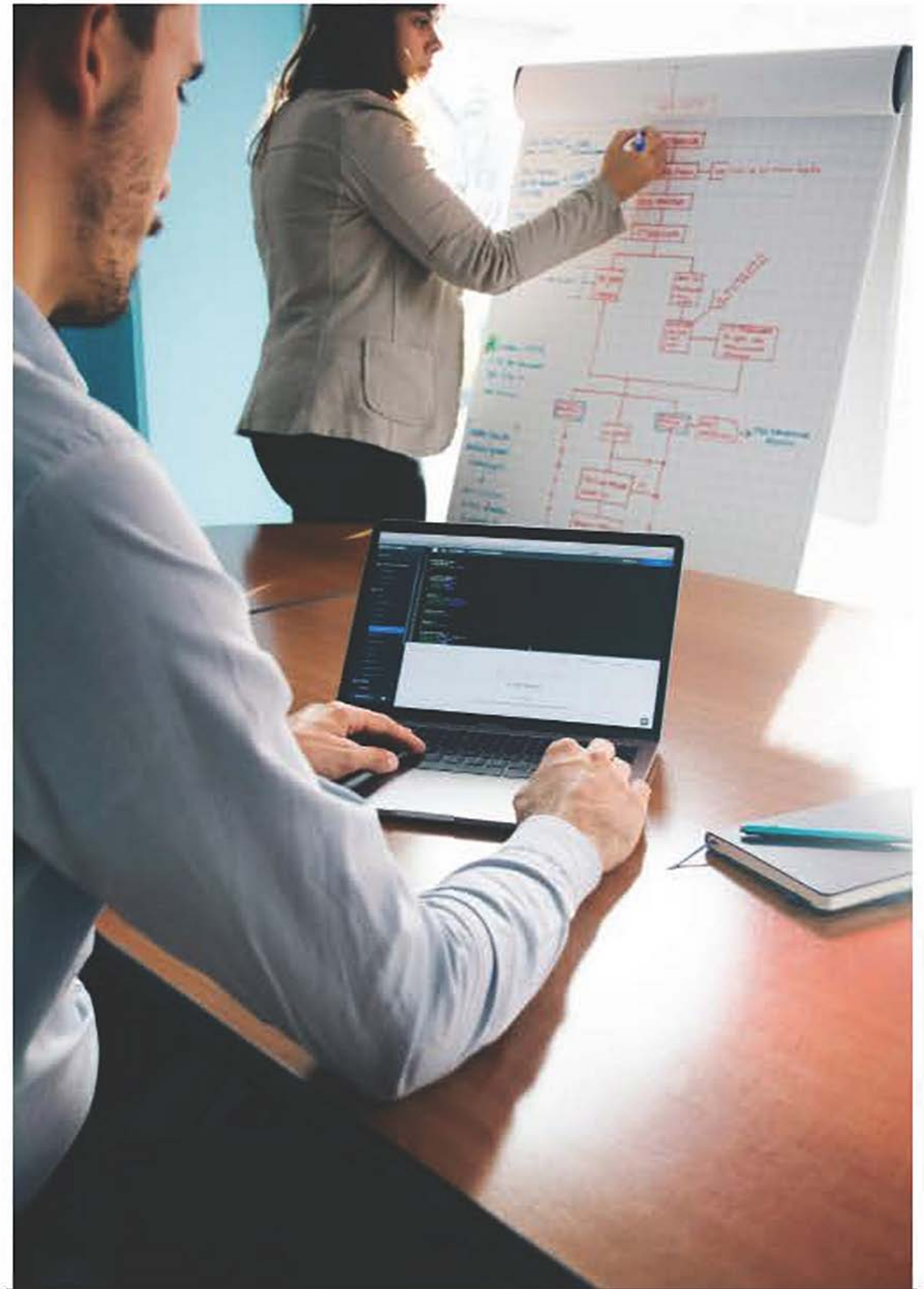
What Is Financial Virtual Assistance?

We are a network of finance professionals with many years of experience in the personal finance industry, both as assistants and as advisors.

Our experience has exposed us to the good and the bad when it comes to an advisor-assistant relationship.

Our goal is to use this experience to **provide simple virtual assistant services to advisors who may need it during these unprecedented times.**

Take advantage of working with an assistant who **already knows the ropes** and is ready to align with your goals and optimize your individual efficiency.



Financial Virtual Assistance Process

Business Overview

- Section 1: Overview of the Advisor's Business
- Section 2: Internal Processes
- Section 3: Business Resources
- Section 4: Company-Specific Information

Acquisition of Clients

- Section 1: New Prospects
- Section 2: Client Onboarding
- Section 3: Time Management & Prioritization

Maintenance of Clients

- Section 1: Client and Policy Maintenance
- Section 2: Periodic Reporting
- Section 3: Proactive "Get In Touch" Strategies

Ryley Smith, Financial Strategist

More Membership Benefits

"Ask Us Anything" Zoom Calls

Take advantage of our monthly "Ask Us Anything" calls where you and your virtual assistant can both attend to ask

Email Templates

Access to 20+ templates (application process emails, FAQ's, etc) that can be used by your virtual assistant or added

Contract & Agreement Templates

Utilize your assistant's expertise by requesting contract and agreement

"Ask Us Anything" Zoom Calls

Take advantage of our monthly "Ask Us Anything" calls where you and your virtual assistant can both attend to ask us all your questions.

Email Templates

Access to 20+ templates (application process emails, FAQ's, etc) that can be used by your virtual assistant or added to your email service provider.

Contract & Agreement Templates

Utilize your assistant's expertise by requesting contract and agreement templates for new or existing clients.

Business Manual

Have your virtual assistant update and maintain your Business Manual to ensure that your team and clients are following your business systems with detailed process and procedures.

Documents

Allow your assistant to update or manage your application questionnaires, forms, and other operational documents.

Videos

You'll gain access to our video library for financial advisors and virtual assistants. Additionally, you'll create training videos for your business with the help of your virtual assistant.

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