ADVISOR SUPPORT

- We train and collaborate. We sink or swim together so our advisors are collaborative, not competitive
- Our friendly and knowledgeable staff is available to answer questions and assist with paperwork and compliance issues
- Transition support and assistance to be sure the process is as smooth and non disruptive as possible.
- Access to the WealthCare asset management system and Planning Tools- Financeware – Very competitive price
- Comprehensive Compliance support at a 35% discount from LPL
- Premier Elite Concierge Insurance Brokerage Support
- Our case design and proposal department (WAST) Wealth Advisory Support Team
- We maintain a network of estate planning attorneys and other professionals
- We have our own Third Party Administrator for retirement plans

ADMINISTRATIVE SUPPORT

- Space in our Building and the ability to use conference space almost anywhere in the WORLD! Talk about convenience
- A near paperless office and virtual secure folders for you, your clients and your lifestyle. Work from anywhere and let us handle the document system
- Internet/Phone/Computers - need 'em? We have them. Along with IT support!
- Someone to answer the phones when you are away, asleep or dealing with other clients
- An advanced Exchange email system for web and mobile
- Interactive Website for Advisors and Clients
- We handle record keeping and other regulatory requirements so our advisors can spend more time with their clients and prospects

MARKETING SUPPORT

- We will make marketing materials for you and about you. From printed material to website biographies, a bio-video and an online presence, we handle the tough stuff and make you look smart
- Our Marketing Team uses a professional Customer Management System (CMS) system to turn leads into prospects
- Our Marketing Team plans regular client events, including trips to sporting events, art galleries and other local attractions