FINANCIAL RESOURCES GROUP INVESTMENT SERVICES

VIRTUAL SPECIALIST SUPPORT

Our Virtual Specialist Support team handles the day-to-day details so Advisors can focus on driving revenue. We empower our Advisors by streamlining processes and simplifying operational needs, all while delivering exceptional support.

SERVICES

Operational Assistance

We help you save time and remain focused on growing your business.

- Assist with new account establishment, account maintenance, trading, moving money, and transfer requests
- Resolve time-consuming tasks, client notifications and spearhead escalations
- Maintain regular and proactive communication with clients, improving satisfaction and retention
- Provide Account View assistance with activation, and end client support
- Calendar management, schedule appointments and assist with meeting preparation

Dedicated Support

We offer dedicated support to help build efficiency within your business.

- Dedicated specialist and single point of contact for you and your clients
- Client relationship management (Salesforce/Redtail)
- Liason to help execute marketing initatives on your behalf (Marketing on Demand, FMG Suite, Marketing Regulatory Review)
- eMoney/Wealthvision support

Flexible Service

We offer flexible and affordable service contract terms for your business needs.

- Scale services up or down based on workload, business growth or seasonal demand
- Operate from anywhere, providing continuous regardless of location
- Customizable menu of services tailored to your unique business needs

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VIRTUAL SPECIALIST SUPPORT

2024 PRICING

Valid for agreements starting 6/1/2024

▪ New Account Opening ▪ Account Maintenance ▪ Data Management ▪ Reporting ▪ Client Support ▪ Scheduling ▪ Contributions & Distributions ▪ Call Support ▪ Meeting Preparation ▪ Event Planning ▪ Direct Business Support ▪ & more...

PREMIUM

$800

Ideal for existing solo reps

WHAT YOU GET:

- ✓ Up to 5 hours per week including weekly meetings
- ✓ Simple transactions only *(Account Establlishment/ Account Maintenance/ Move Money/Account Transfers/Account View Subscriptions/ Simple Reporting)*
- ✓ Monthly invoicing
- ✓ Basic notification review

ULTIMATE

$1,200

Ideal for new solo reps & small teams (1-2 Reps)

WHAT YOU GET:

EVERYTHING IN PREMIUM

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- ✓ Up to 10 hours per week including weekly meetings
- ✓ DBA email
- ✓ DBA phone number
- ✓ Client support
- ✓ Up to 2 months of post-transition support

PLATNIUM

$2,000

Ideal for new teams

WHAT YOU GET:

EVERYTHING IN ULTIMATE

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- ✓ Up to 15 hours per week including weekly meetings
- ✓ Up to 6 months of post-transition support

PERSONALIZED

Custom Pricing

Ideal for solo reps or teams

WHAT YOU GET:

- ✓ 20 + hours per week including weekly meetings
- ✓ Fully-customized support
- ✓ Long-term or full-time support
- ✓ ClientWorks training

First 30 days are evaluative and will be reviewed prior before signing Master Service Agreement to include ongoing pricing and terms. Pricing is always subject to change for new subscribers.

Learn more by contacting us today!

FRGVirtualSpecialistSupport@lpl.com

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financialresourcesgroup.net