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RIA Consulting Services

Leveraging my 8+ years of RIA experience will save you time, money and assist you in building out a solid and competitive offering for your clients.

Services Offered:

- **Compliance and Legal:** I have established relationships with compliance firms and attorneys that can assist with Compliance, RIA Formation, Disclosure Drafting, and general legal counsel.
- **Technology Advisory:** Performance Reporting, Financial Planning, Portfolio Analytics, Risk Management, Cloud Storage, Social Media Archiving, Billing, Rebalancing, TAMPs, CRM and Integration with Custodian(s). Extensive knowledge of all technology providers available to RIA firms from 8+ years practicing as an advisor in the independent advisory space at HighTower Advisors and my RIA firm, Rapport Financial.
- **Practice Management:** Templates: Investment Policy Statement, Risk Tolerance Assessment, Client Profile and Wealth Management Questionnaires, etc.
- **Marketing and Strategy:** Marketing Decks, Social Media Marketing (Twitter, Facebook, LinkedIn, Blog), email marketing and integration with CRM. Build out of various advisory fee models: AUM, Flat Fee, Subscription, Hourly, and customizing creative offerings that resonate with your target demographic.
- **Operations:** Build out and design firm infrastructure and client onboarding process.

Advisor Consulting Packages:

3-hour retainer: \$825
6-hour retainer: \$1,499
9-hour retainer: \$1,999

**50% of retainer is billed in advance with the remainder due upon completion of work. We accept PayPal and Wire Transfer.*