

# Integrated Professional Services

INCREASING THE VALUE OF YOUR TIME

*Partnered staffing and outsource solutions for running an efficient financial planning enterprise.*

## Why Integrated Professional Services?



### The Platform

***Dreading the thought of another platform?***

***Not to worry.*** The platform is delivered seamlessly through Founders' core technology, so you get to reap the benefits without any added complexity.



### The Talent

***We hire and manage the talent while you***

***focus on your clients.*** Founders employees service the platform, so you know the same level of care, service, and industry standards are upheld.



### Your Brand

***You remain at the front and center of the client***

***relationship.*** The platform can also help strengthen your brand recognition through systematized client communications.



### Your Time

***Increase the value of your time.*** By scaling your enterprise operations, you are able to reallocate your time towards growth and relationship focused activities.

## Platform Functions

- ▶ Data entry
- ▶ Forms preparation & processing
- ▶ Financial plan preparation
- ▶ Investment plan preparation
- ▶ Client data gathering
- ▶ Client financial plan update
- ▶ Report preparation
- ▶ Client communications
- ▶ Data collection & maintenance
- ▶ Annual review preparations
- ▶ Client review meeting
- ▶ Client-facing technology set up

*“This program has transformed each team member’s role in the best way possible. We now have the time to do what we want to do. While the Integrated Professional Services team takes care of the ‘processing,’ we are focusing on client relationships and professional development. In just five months, we have increased our growth by 20%, and we couldn’t be more excited about the future.”*

**Alec Knight**

Brooks Financial Group, Inc.  
Member Partner since 2010

**INNOVATIVE PLATFORMS, POWERED BY PARTNERSHIP.**

Learn how **Integrated Professional Services** can elevate your business today.

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