Removing complexity so you can prioritize what matters most, your clients and growth!

1 Website and Branding
- White-labeled digital marketing & advertising agency
- Monthly educational campaigns & newsletters
- Fast in-house compliance and a vast catalog of already approved marketing materials

2 Fill the Funnel
- Proven systems run on your behalf
- Designed to fill your client funnel
- Seminar program built to drive client's growth in business, legacy, and retirement planning

3 Lead Nurture
- Tax return preparation with proactive tax planning
- Ensures symmetry of information, no missed savings
- One-stop solution for clients' financial, tax, and lifestyle goals

4 Analysis
- Comprehensive Investment & financial analysis reports
- Analytical team handles insights with prospects
- Real-world practice in analysis interpretation and presentation

5 Planning
- Custom plans based on client goals, life stage, personal events, & investment preferences
- Integrated income and tax strategies
- Aligned with tailored investment recommendations

6 Asset Management
- Expert management of tailored client accounts
- Holistic tax optimization
- Proprietary monthly reporting
- Freeing of accounts and full administration

7 Back Office Operations
- Handles all paperwork so you don't have to
- Manages new account setup and transfers
- Oversees eSign system for secure, efficient processing

8 In-House Tax Services
- Expert tax return preparation and year-round planning
- Proactive strategies to maximize savings
- On-staff CPA available to answer client questions

9 Client Success Team
- Dedicated to client operations and ongoing servicing
- Ensures all clients become long-term fans
- An extension of your office so you can focus on what matters most, your clients!

10 Client Reviews
- You present the results; we do the heavy lifting
- Automated invites with personalized tracking
- Comprehensive analysis of goals, risk, and tax strategies summarized in a simple Review Document

Financial Gravity