# *Outsourcing* Resource List

OUTSOURCING SERVICES THAT ARE RECOMMENDED BY OTHER LIMITLESS ADVISORS.

## VIRTUAL ASSISTANTS (VAs) AND PARAPLANNING

• Athena Executive Services
Athena charges $40 to $50 an hour for their people. While this may seem like a steep rate, it includes ALL taxes and benefits, plus saves you from having to hire, train, and supervise employees.
https://athenaexecutiveservices.com/

• Ruby Receptionists
Save time by delegating incoming calls and/or online chat with Ruby Receptionists. You can hire a live virtual receptionist or opt for live 24/7 chat to grow your online leads. Receptionist pricing is based on minutes per month and ranges from $309 to $1,369. Live chat ranges from $249 to $549 per month.
https://www.ruby.com/

• Belay Solutions
Customize your own business solutions with virtual assistants, bookkeepers, and web specialists. Discuss your needs with a client success consultant and then get partnered with a remote, US-based contractor.
https://belaysolutions.com/

• Total Office, Inc.
Total Office provides back-office support through client services, account administration, and best practices and technology. They specialize in working with CFPs, RIAs, Independent, fee-only, and broker-dealer advisers.
https://totaloffice.cc/

• Simply Paraplanner
Simply Paraplanner outsources the plan creation process. Find a remote paraplanner to help you with tasks like financial plan preparation and client onboarding. You can manage your own hiring process for $249 to $349, or have Simply Paraplanner lead the candidate screening process for $2,499.
https://simplyparaplanner.com/

• Delegated Planning
This is another service that allows you to delegate the development and maintenance of your clients' financial plans. There's a minimum of 10 hours per quarter and the hourly fee is $160. Delegated Planning has an in-house team you work with, rather than relying on independent contractors.
https://delegatedplanning.com/

## FINANCIAL AND BOOKKEEPING

### • XY Bean Counters

This accounting and bookkeeping service focuses on financial advisors. Full-service bookkeeping runs $107 per month, while their tax season clean-up package costs $1,479.

https://xybeancounters.com/

## COMPLIANCE

### • Financial Planners Assistance

Manages firm registration and provides the tools needed to run a compliant practice. Also provides on-going consulting, mock audits, ERISA consulting, advertising review and intensive compliance care. Cost approximately $200 per month.

https://www.fpacompliance.com/

### • Beach Street Legal

Provides high-quality, practical counsel for the investment advisory and financial planning community at a cost of $450 per month, which also includes one hour of legal advice (usually $400 per hour).

https://beachstreetlegal.com/

### • Polaris Compliance Consulting

Whether you want to start your own RIA, or need a compliance assessment analysis conducted of an existing program, Polaris offers solutions that meet your needs and finds ways to make compliance fit seamlessly into your business model. Personal approach with retainer-type options.

https://www.polariscompliance.com/

## E&O INSURANCE

### • Starweather & Shepley (from Paige)

Based in Rhode Island and ranked 57th on the Top 100 Brokers by Business Insurance/ 34th on the Top 100 Property/Casualty Agencies by Insurance Journal. Offer commercial insurance and risk management solutions for startups and established enterprises.

https://starshep.com/

### • Calsurance (from Don)

With over 50 years' experience, large broker serves professionals nationwide including some of the largest financial firms and insurance companies in the US.

https://calsurance.com/

## MARKETING & DESIGN

• Entreteam

Entreteam focuses on results-based solutions, with areas of expertise in marketing, technical and operations tech solutions. Entreteam is vetted through Limitless.
mailto:entreteambiz@gmail.com

• Wilnau Design

Wilnau Design specializes in creating high-converting websites and marketing systems for established independent financial advisors and brands. No template websites here; we have/do work with Jeff Rose, Adam Cmejla, and Taylor Schulte in the financial industry, to name a few.
https://www.wilnaudesign.com/limitlessfa/

• Tina Powell / C-Suite Social Media

Led by Tina Powell's 20+ years of industry experience, C-Suite Social Media empowers financial services professionals and CEOs with digital marketing and social media expertise in a 30-60-90 day marketing sprint framework, plus marketing coaching and full service social media packages.
https://csuitesocialmedia.com/

• FMG Suite

Specialized creative content, websites and marketing automation by an award-winning San Diego-based company with offices worldwide, all focused on serving financial professionals.
https://fmgsuite.com/

• FP Pathfinder

Interactive, brandable and customizable flowcharts and checklists help you navigate complex financial planning questions with a design edge for ease of presentation and analysis.
https://fppathfinder.com/

• Upwork

You can discover a range of freelance professionals on Upwork to help you with a multitude of tasks such as marketing, social media management, ghostwriting blogs or e-books, and graphic design. In addition to reviewing candidates who respond to your job listing, you can also browse freelancer profiles and invite people to apply.
https://www.upwork.com/

• Fiverr

Fiverr is designed to help you hire out "gigs," whether it's finding someone to create a Facebook ad, write a press release, or make some kind of video. It's similar to Upwork except you see pricing per gig upfront, plus add-ons for extra services.
https://www.fiverr.com/

• Steve Wershing
Steve Wershing helps advisors tell their marketing story in an effective way, and also produces a podcast in collaboration with Julie Littlechild.
https://clientdrivenpractice.com/

• Richard Arsonson
Richard Arsonson is storybrand certified and creates websites for $3k
https://watershed-creative.com/

## VIDEO RECORDING

• Loom
Loom allows you to record quick videos of your screen and camera, enabling higher information retention from recipients and less time spent typing out long emails that you'll have to explain in person later. Free for up to 5 users and video segments of 5 minutes or less; business level ($8/creator/month) includes more advanced recording and analytics options, as well as transcription and closed captioning, custom branding and unlimited recording length.
https://loom.com/

• Soapbox/Wistia
This webcam and screen recorder for Chrome offers free and paid pricing plans. If you want added functionality, for $300/year you can download videos for sharing, sending or posting; track engagement and conversions; customize pages with your logo, and book meetings directly from your videos.
https://wistia.com/soapbox/

• Camo
This app allows you to leave the inferior quality of your webcam picture behind by harnessing the features of your mobile device camera, which is far superior in quality and editing features. With free and paid plans, as well as simple setup, this app supports Zoom, Meet, Teams, Skype, Slack, Chrome, and many others. It boasts Britain's highest business honor, the Queen's Award for Enterprise, and has helped over 10M users over the past decade.
https://reincubate.com/camo/

## EMAIL/BROADCAST PLATFORM

• Infusionsoft/Keap
CRM, advanced campaign building, tagging, and available integrations with tools like Zoom, Asana, Zapier, Airtable, and popular payment platforms.
https://keap.com/

• Constant Contact
Email and social marketing/list-building plans start at $20/month.
https://www.constantcontact.com/

• Active Campaign
Offers marketing/messaging automation, dynamic content, event tracking, CRM, site messages and predictive content, ecommerce, email marketing campaigns, segmentation and more. Plans range from $22 (lite) to $194 (enterprise) per month.
https://www.activecampaign.com/

• Convert Kit
CRM and powerful sales funnels specially geared toward podcasters and coaches. Plans range from free to $25/month.
https://convertkit.com/

• Redtail
Robust CRM database management with complimentary database conversions, broadcast emails, custom exporting, workflow processes, detailed reports, free support and much more. $99/month per database includes up to 15 users.
https://corporate.redtailtechnology.com/

• Text Expander
Eliminate repetitive tasks and do more using snippet responses to streamline your communication efficiency. Keep your whole team operating in the same brand voice. Plans start at $3/user/month for individuals or business packages are also available.
https://textexpander.com/

## TECHNOLOGY

• RIA OASIS
RIA OASIS offers promises to help advisers make sense of RIA technology and optimize their financial services offerings to help grow businesses more efficiently. Recommended by adviser success specialists for having a strong tech tack/ knowledge.
https://riaoasis.com/

• Right Size Solutions
Including backup and recovery, private cloud, compliance and IT security, Right Size Solutions is an online security resource for financial professionals. They "specialize in helping RIAs gain peace of mind through secure, efficient technology solutions from privacy and security to compliance and the cloud.
https://www.rightsize-solutions.com/

• True North Network
True North Networks functions as an outsourced IT department, giving clients Enterprise-level services and solutions at prices that work for small businesses. Their teams respond to issues quickly, often before you even know about them. Covering everything from your servers and network infrastructure, to your computers, workstations and mobile devices, we provide end-to-end solutions for all of your technology needs.
https://www.truenorthnetworks.com/

• Orien
Orien is a cloud-based asset management solution with an easy-to-learn interface. The app includes tools to manage lifecycle costs and minimize risk, and at the same time maximize asset performance. With plans from shared tenancy level through enterprise, there are multiple packages available to suit your firm's needs.
https://www.orien.app/

• Black Diamond
This wealth management platform helps you manage client relationships, reporting, rebalancing, compliance and more. Featuring intuitive dashboard structure and smart integrations, this multiple-award-winning platform enables you to deliver a sophisticated, modern client experience.
https://blackdiamond.advent.com/

• eMoney
This advisor-focused software helps you plan, engage, manage and deliver across the client lifecycle in a streamlined, forward-thinking way.  Multiple packages enable you to choose from foundational to advanced level planning, engagement and management tools to engineer tangible outcomes for the complex wealth management scenarios you face.
https://emoneyadvisor.com/solutions/for-advisors/

• Hubly
This is a workflow tool built specifically for financial advisors and their teams to help ensure that nothing falls through the cracks. Built-in CRM integration with Wealthbox and Redtail, and synchs completed workflows back to your CRM for compliance. Templated workflows help you get up and running quickly. Priced at $79/month per user.
https://www.myhubly.com/

• Advyzon
With functionality for portfolio management, CRM, client portal and mobile app, secure document management, billing and more, Advyzon includes features and plans for firms of any size. With a 94% average client retention rate, Advyzon integrates with Charles Schwab, TD Ameritrade, G Suite, Riskalyze, AdvisorPeak and many others.
https://www.advyzon.com/

• Right Capital
Touted as the industry's most intuitive user interface, this financial planning software allows you to create a financial plan in as little as 10 minutes, and present a plan that's easily understandable for your clients. Basic plans start at $125/month and cover everything from investment planning to retirement, college, insurance, and tax planning. Lead generation, CRM and a client-facing mobile app are also part of the basic package.
https://www.rightcapital.com/

• Asset Map
Featured in Forbes, Investment News, FA Magazine, Kitces.com and many others, Asset Map creates professional infographic-style asset maps that allow advisors to apply their insights for clients in real-time. Help to define every client's financial priorities and track progress with interactive target maps, and explore a suite of tools that help you be proactive in helping the households you serve to stay on track. Multi-tier pricing based on your practice needs, and the contract you select.
https://www.asset-map.com/

• Precise FP
Build your client experience in harmony with your existing systems through configurable templates and time and money-saving integrations that maximize your productivity. Try for free; afterwards standard pricing is $60/month for small businesses and solo practitioners.
https://precisefp.com/

• Elements Financial Planning System
Designed to be repeatable in its process elements, this app gives advisors the framework and ability to efficiently show recurring value and deliver a next-gen experience for clients.
https://getelements.com/

## FILE SYSTEM

• Sharefile
Sharefile by Citrix integrates with multiple other platforms including Keap/Infusionsoft, and helps you accelerate productivity with real-time feedback, document approvals, co-editing, and even legally binding e-signatures on any device.
https://sharefile.com/

## PROSPECT PROCESS

• LinkedIn Sales Navigator
Automated Social Lead Sniper provides multiple methods for gaining the attention of your potential client (per day, per account), keeping you from overusing your account and allowing you to leverage the full power of your Sales Navigator LinkedIn Account (instead of utilizing it at only 20% of its capability, as most LinkedIn users do).
https://socialleadsniper.co/

## CLIENT BILLING

• BillFin
Simplified billing software for financial advisors. Prorated billing, embedded reporting, payment files, intuitive UX, onboarding, multi-tier options and more, along with a free trial demo.
https://www.redi2.com/billfin/

• Capitect

Simple reporting and billing on custodian, held-away and even cryptocurrency accounts. Asset allocation, performance reporting, client fee billing and advisor portal, along with personalized target portfolios and flexible rebalancing on offer. Starts at $110/month up to professional level plan at $335/month for the first 100 households. Data migration and account aggregation options also available.
https://www.capitect.com/

• Advice Pay

Billing and payment software designed to support fee-for-service financial planning, allowing advisors to stretch beyond the AUM model and grow their business with flexible options. All the basics for a new firm or solopreneur start at $10/month, with additional levels offering advanced features for larger practices.
https://advicepay.com/

## CUSTODIAN

• Altruist

Powerful software helps you seamlessly manage your business, streamline your RIA, lower costs and thrill your clients. Altruist allows you to open accounts online without extra hassle, build custom model portfolios, trade fractional shares commission-free, and keep your investing and reporting in the same place. These features and more (e-signature, CRM, Risk Analytics, Fee Billing...) come with first 100 client accounts free; afterwards, $1/account each month after.
https://altruist.com/product/

• Assetmark

Investment research, client communication, portfolio construction and more means you spend less time running the shop and more time with your clients and engaging in energy-creating activities in your practice. Use this platform to build portfolios that are all researched and monitored by a team of due diligence professionals and save an average of 8.4 hours per week.
https://www.assetmark.com/

## TIME MANAGEMENT

• Acuity

Award-winning scheduling software app ends phone tag, allows easy calendar sharing and sync, offers payment integrations, gift certificates, packages, memberships and more.
https://acuityscheduling.com/

• Calendly

Set simple rules, share your link and get booked easily and professionally. Works across all your calendars and coordinates it all so you can do more of what you excel at and stop worrying about the rest.
https://calendly.com/

## HIRING

• Strategic Implementer

Your pit crew to help you master the art of a self-running firm and taking control of your time by utilizing the hiring assistance expertise of a company that specializes in staffing for financial advisors.

https://thestrategicimplementer.com/

• The Judson Group

The Judson Group is an executive search firm that specializes in Banking and Wealth management talent nationwide by providing both permanent and contract staffing solutions.

https://www.judson-group.com/

• New Heights Solutions, LLC

Partners with Independent, registered RIA firms and financial planners to source back-office solutions, including virtual assistance and paraplanning.

https://newheightssol.com/

Do you have an outsourced solution that you love? Send it to coaching@limitlessfa.life and we'll work to keep this resource list updated.