THE GRID REMOTE ADMIN PROGRAM

GRID
The Independent Grid

GONE ARE THE DAYS OF HAVING TO GO IT ALONE

Focus on what is important to you and your business by outsourcing your day-to-day office functions to our experienced Remote Admins.

The Independent Grid Remote Admin Program was designed to provide advisors with administrative support in a cost effective manner. Whether you need temporary assistance while existing staff are out of the office, or you're looking to secure a more permanent solution, your Grid Remote Admin can help.

Here's how it works:

1. You identify which tasks you want to outsource to your Remote Admin

2. Based on your need, you are assigned one primary admin who will work with you to learn about your office values, goals, and daily operations

3. Your primary admin is backed by a team to ensure you never feel a lapse in service

Our goal is to be part of your business and cuztomize our work to align with your values.

SERVICES

Paperwork Generation, Submission, and Follow-Up

Preparing account opening through fact-finding, client outreach, and communication, as well as document preparation of account opening/update documents. Includes direct, brokerage, third-party manager, financial planning engagements, retirement plan, and insurance.

- Prepare client account paperwork, including customized forms and form groups
- Delivery of documents to financial professional for review and signature
  - Securely email paperwork to financial professional for completion
  - Use DocuSign to email client paperwork for electronic signature
  - Use file sharing service for document delivery
- Using standard technology (including CLIC, Trade Review, Paperwork Status Monitor, and Service Requests)
- Monitoring and resolution of service items
- Delivery of document(s) - mailed with cover letter and instructions for completion (sign here tabs, highlighted information, etc.)

Client Management and Communication*

- Calendar management
  - Appointment scheduling
  - Reminders (email, phone, appointment card, etc.)
- Client outreach and assistance, including information gathering

**We do not enter trades or cold call potential clients.*

Reporting and Planning

- Data maintenance in CIRStatements
- Quarterly performance report generation in CIRStatements
- Financial planning client/account data
- Financial planning report preparation
- Financial planning client vault setup and reset

Technology

The Grid Remote Admins are trained and knowledgeable in the following Cambridge core technologies:

- CIRStatements
- CLIC
- CLIC Advisor/CLIC Client
- DocuSign
- Hearsay
- NetX360®
- Redtail CRM
- Wealthbox
- Smarsh®
- WebCapture
- WealthPort
- Wealthscape℠

The Grid Remote Admins are trained and knowledgeable in a plethora of other technology systems. If you have any customization within these programs, please reach out to see if your system is one a Grid Remote Admin will consider using.

COST OF SERVICES

$40/hour

Billed in 15 minute increments

(15 mins = $10)

FOR MORE INFORMATION

TheIndGrid.com
888.944.9725

The Independent Grid

Plug In. Power Up.

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