VALENTA BPO

Process Consulting • Digital Transformation • Outsourcing

Australia | Canada | India | Malaysia | New Zealand | UK | USA

FINANCIAL PLANNING VIRTUAL ASSISTANT

Our financial planning support teams can help you with various administrative tasks and implementation activities, annual reviews, advice implementation and general business administration.

Financial Planning Support

- Create and send Engagement Agreement to clients
- Collect data from client
- Data entry into financial planning software (NaviPlan, Razor, PlanPlus, SnapProjections)
- Retirement Projections
- Cash Flow Plans
- Debt Conolidation or Snowball Plans
- Tax Planning

Insurance Support

- Illustration Creation
- Proposal Creation (Life Design Analysis)
- Pre-filling applications
- Preliminary Underwriting Requests
- Ordering Evidence Requirements (Dynacare, Hooper Holmes, ExamOne)
- Underwriting Monitoring
- Compliance Requirements
- Virtgate Management
- Privacy Policy
- Advisor Disclosure
- Needs Analysis Documentation
- Reasons Why Letters
- Life Insurance Replacement Declaration (LIRD)
- Change Requires (beneficiary, change)
- Quarterly/Annual Reporting

Investment Support

- Proposals (Morningstar, Illustration Software etc.)
- KYC Requirements
- Suitability Requirements
- Fee Disclosure Statements
- Investment Policy Statements
- New Business Application Form (Fidelity, National Bank, RBC, Wealtsimple, Life Insurers etc.)
- Transfers
- Service form processing
- Quarterly/Annual Reporting

Administrative Support

- Liaising with clients to schedule appointments with advisors
- Prepare meeting agendas
- Transcription of file notes / meeting notes
- CRM management and documentation

Management and Finance Support

- Quickbooks
- Bookkeeping
- Commission reconciliation
- Payroll
- Billing and invoicing clients
- Revenue Management and Reporting
- CRM Sales and Activity Reports

OUR PRICES

FULL TIME FINANCIAL PLANNING VIRTUAL ASSISTANT
$2,000 / per month (40 hours per week)
PART TIME FINANCIAL PLANNING VIRTUAL ASSISTANT
$1,250 / per month (20 hours per week)

SOFTWARE EXPERTISE

Sun Life | National Bank Independent Network | Trello | Nest Wealth | Intuit Mint | PlanPlus | pipedrive | Razor Plan | NaviPlan by Advicent | SNAP Projections | Life Design Analysis | Wealthsimple | Manulife | QuickBooks

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