

ALL ADVISORS PRACTICE SIZE <\$20M

Client Services Operations	Review your practice and share our product shelf capability and philosophy	✓
	Personalized Transact, systems and account opening training	✓
	Dedicated account opening assistance (provided by your Division Director)	✓
	Self serve weekly transfer reports available (provides progress of all in flight transfers)	✓
Marketing Support Area Field Marketing support, launch event, client scripts, social media support	✓	
Technology Support Device suitability support, on demand technology support	✓	
Planning Specialist Network Specialists presentation to understand holistic support that's available	✓	
Compliance Introduction to your Compliance presentation	✓	