

Advisors & planners must keep their **ENTIRE** tech ecosystem in mind when evaluating new technology or integrations.

Auto-Scheduling Dictation
Document Management
Email Capture & Hosting
eSignature
Form Filling




**PORTFOLIO
MANAGEMENT**

Investment Research
Risk Tolerance
Trading & Rebal
Billing

Document Sharing
Marketing
Net Worth
Outside Asset Aggregation



**FINANCIAL
PLANNING**


Net Worth
Outside Asset Aggregation
Plan Sharing

RIA TECH STRATEGY SERVICES:

Research, Assessment, Implementation and Integration to help grow your business more efficiently.

TECH ASSESSMENT & RECOMMENDATION

We assess your tech needs & wants while identifying your current usage. We create a customized recommendation process, show & explain the tech options, introduce you to the vendors and foster the decision-making process.

OPTIMIZATION OF CURRENT TECHNOLOGY

Accelerate your tech learning curve without self-help videos & whitepapers. We screen share, training you on the systems and the quick win tech functionality, optimizing what you have to create a huge impact to productivity!

BEST PRACTICES & WORKFLOW BUILDING

Repeatable processes create accountability and efficiency. We help your firm define your best practices and build workflows directly into your CRM.

INTERESTED IN LEARNING MORE?

Schedule your free 30-minute Meet & Listen Call with RIA Oasis today: riaosis.com/contact

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