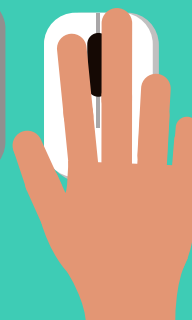
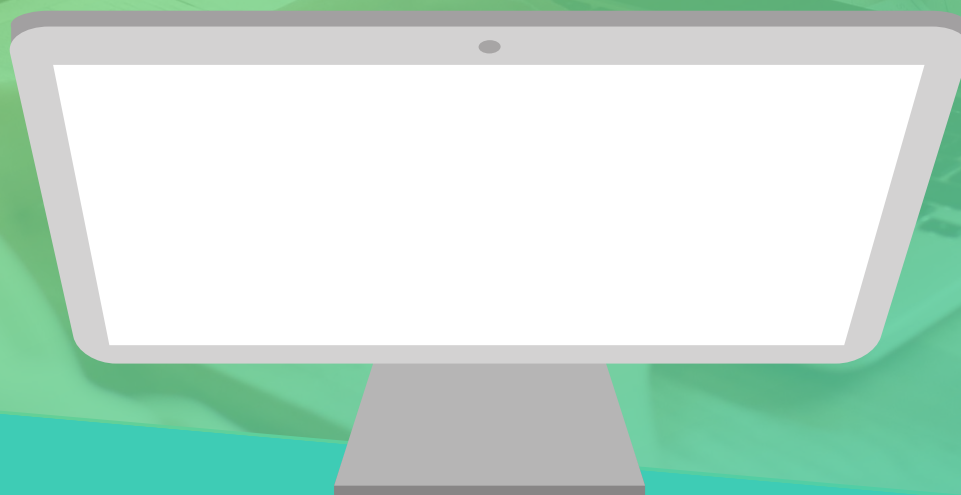




NIFTY ADVISOR SUPPORT

THE VIRTUAL ASSISTANT FOR RIAs



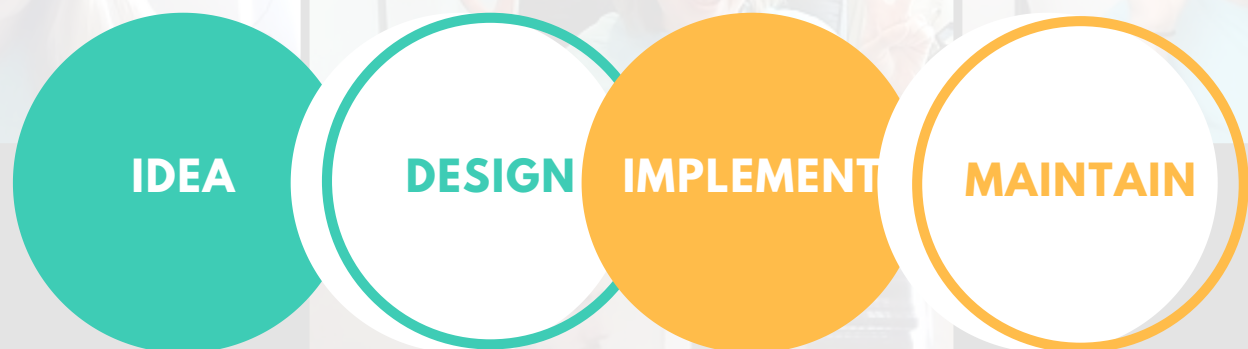
HOW WE'RE SHAKING THINGS UP

Nifty Advisor Support reimagines when it means to own a modern financial planning business. With a dedicated white-glove focus towards Registered Investment Advisors, Nifty works with firms across the United States to build and manage holistic client experiences.

Our **MISSION** is to foster an inclusive environment for learning, collaboration, and growth within the financial planning industry that caters to multiple careers, backgrounds, and lifestyles.

Our **VISION** is to be the industry leader in virtual and sustainable business solutions for Registered Investment Advisors.

You deserve quality with every step and interaction of your client experience. At Nifty Advisor Support, we follow a four-step process to ensure every action in your client experience is always clear and intentional.



DID YOU KNOW?

The world of virtual assistance started in the 1990s. Every virtual assistant has their own skills and specializations that helps support small businesses. It's even better if they have a niche - like Nifty!



Only pay for the hours we work.

Via Business Insider, the average FULL-TIME employee only works for 2 hours 53 minutes.

We're independent just like you.

No broker-dealer. No investors. No Registered Investment Advisor holding us by the strings. Nifty Advisor Support is an independent Limited Liability Company so we're able to serve our advisors to the best of our ability with no conflicts of interest.

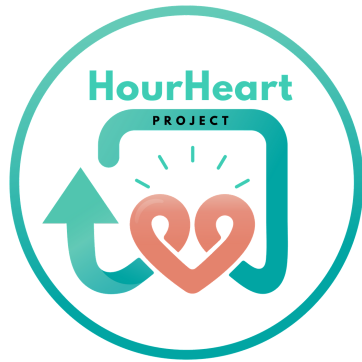


Spend more time in front of clients.

Via Kitces Nerd Eye View, over 20% of your time is spent on back-office tasks that you could be spending in front of your clients.

Focus on your passion, not your back office.

Advisors truly underestimate the time it takes to manage their back-office so they can be the best they can be in front of clients and prospects. Leave your back office to the experts to save time and money you could use elsewhere.



THE HOURHEART PROJECT

Nifty Advisor Support donates \$1 to financial education programs for every hour we bill from our services.

Beginning in July 2020, the HourHeart Project was created as a result of a desire to provide a greater impact within communities that lack resources for proper financial education. While the lack of financial education is a global issue, personal finance is rarely taught despite the importance.

Through our active work with the HourHeart Project, the Nifty team and advisors are able to contribute to one of the core causes of poverty and crime in disadvantaged communities.

Funds earned from the Nifty Advisor Network also supports the HourHeart Project. Donations are made on a semi-annual basis and are reported on our 2nd and 4th quarter newsletters.

OUR EXPERTISE

Understand the knowledge that powers our team everyday.



DIGITAL MARKETING

- Full-suite marketing support
- Expert design in both Adobe and Canva
- Targeted content to your ideal audience
- Custom uniform branded content
- Utilize your existing finmarketing systems



CLIENT SERVICING

- Collectively 30+ years serving financial planners
- Experience with Charles Schwab, Fidelity, and TD Ameritrade, SEI, and SSG
- Utilize advisor best practices while managing your entire back office
- Streamline mundane office tasks



PARA PLANNING

- Aspiring industry, CFP(r) candidates, and CFP(r) professionals working alongside you when you need it most
- Utilize different planning perspectives with one cohesive planning team

FINGEEKS UNITE

Technology doesn't make technology work. People do.

Here are a few of the most popular systems and custodians we work with on a regular basis every day at Nifty Advisor Support.



Don't see your system? Just ask!

niftyadvisorsupport.com

VIRTUAL ASSISTANCE

Minimum of 12 hours per month paid by retainer. Hours do not rollover.

Includes

Marketing Only

Servicing Only

Planning Only

Planning Plus

- Dedicated Support
- Toggl Report
- Slack Channel
- Access to Nifty Advisor Network forums

X

X

X

X

- Social Media Management
- Graphic Design
- Copy writing
- Blog writing
- Website edits
- Podcast edits
- Video edits

X

- Email monitoring
- Scheduling
- Client onboarding
- Meeting prep
- Meeting follow up
- CRM management
- Custodial Paperwork
- Alert and NIGO Resolution
- Admin Support

X

- Data Entry
- Research

X

X

- Plan Development
- Analysis
- Scenario Creation
- Recommendations
 - Cash Flow
 - Education
 - Retirement
 - Taxes
 - Estate
 - Insurance
 - Investments

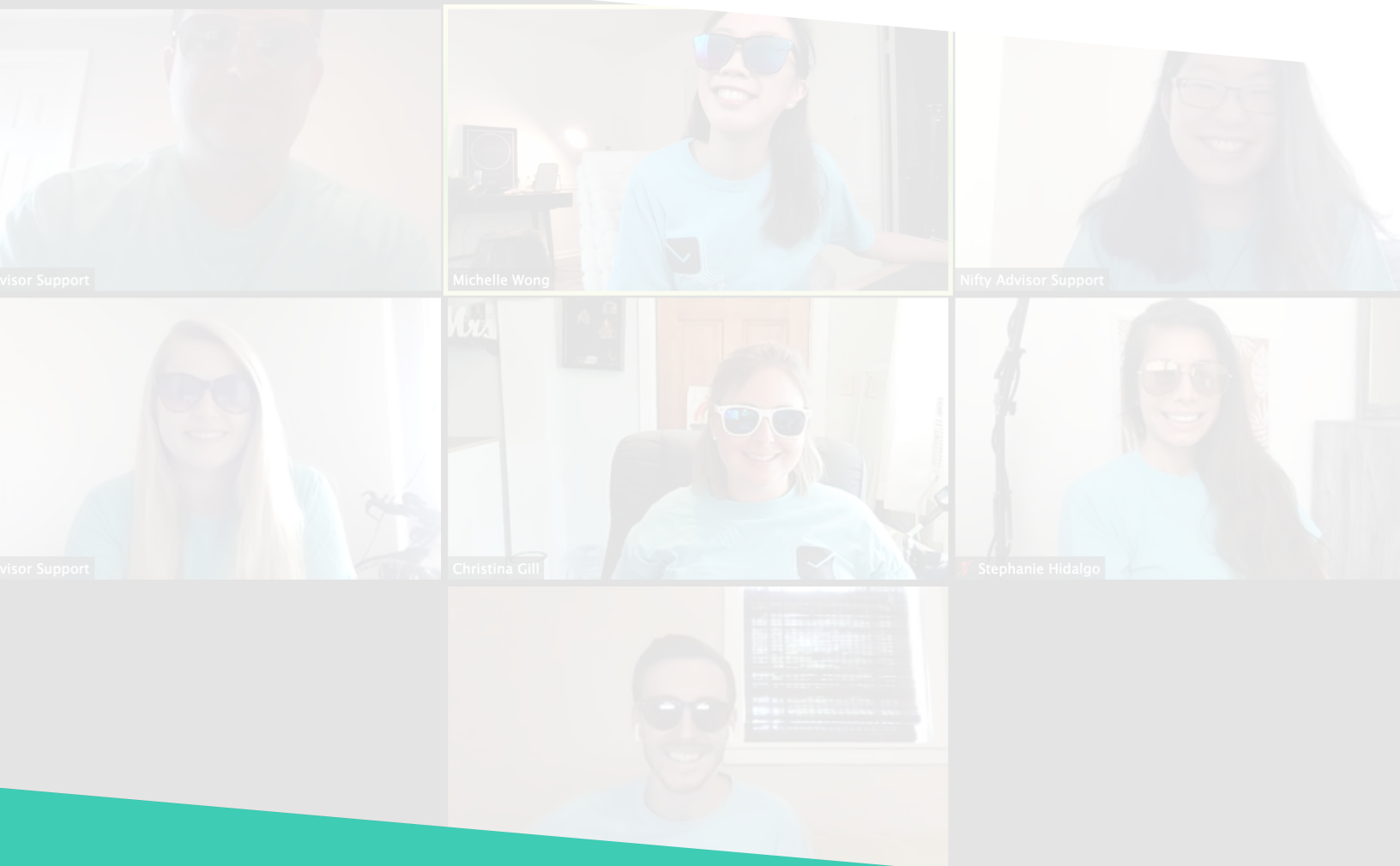
X

\$65/hour
\$80/excess hour

\$65/hour
\$80/excess hour

\$65/hour
\$80/excess hour

\$85/hour
\$100/excess hour



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