

RIA Outsourcing Solutions Built By Advisors, for Advisors

Interested in back office outsourcing? Transitioning to independence? Growing your business? An experienced team and integrated technology? A complete, personalized practice development program?

Partner with FocusPoint and improve your profitability, efficiency, and quality of life.



We offer you a complete package, incorporating two main areas of support designed to meet your needs.

Back/Middle Office Outsourcing

Outsource any and all to your dedicated relationship manager and experienced virtual team:

- Reporting and Billing
- Trading Activities
- Investment Management
- Technology/Software
- Compliance Support
- Advisor Transitions

An experienced back office services team = Client Satisfaction

Practice Development Program

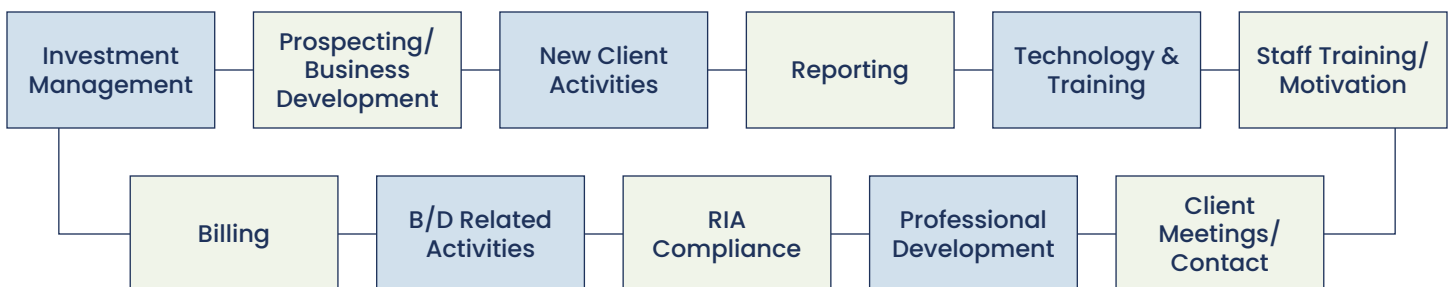
Accelerate growth and scale your business with our back/middle office services and proven strategies:

- Define and target your ideal client
- Redesign your unique message and brand
- Control your client experience
- Grow your business
- Focus on personal/professional development
- Create custom marketing/sales strategy
- Build your succession plan
- Set goals and effectively track your progress
- Maximize the value of your business

A robust practice development program = Business Growth

What does your ideal business look like?

Many advisors who successfully outsource are now able to spend their valuable time like this:



Who We Serve

Breakaway Advisor

Have you considered breaking away but aren't sure how to make it happen?

Our established breakaway solution can actually help you grow...while giving you the ability to maintain true independence. Advisors can confidently outsource back office tasks while utilizing our comprehensive practice development, coaching, and marketing program to help them attract even more business. It's your roadmap to success.

Existing RIA

Do you have your own RIA and find yourself struggling in various areas of your business?

As an RIA, you may be spending too much time trying to integrate all areas of your business, manage the compliance burden on your own, and handle staff and administrative activities. We can help you design your ideal solution, identifying and addressing any gaps you need to fill.

Hybrid RIA

Do you plan to do mostly fee-based business but keep a B-D (broker-dealer) relationship?

Our established breakaway solution can actually help you grow...while giving you the ability to maintain true independence. Advisors can confidently outsource back office tasks while utilizing our comprehensive practice development, coaching, and marketing program to help them attract even more business. It's your roadmap to success.

New RIA

Are you planning to form your own RIA?

Our established breakaway solution can actually help you grow...while giving you the ability to maintain true independence. Advisors can confidently outsource back office tasks while utilizing our comprehensive practice development, coaching, and marketing program to help them attract even more business. It's your roadmap to success.

Bridge RIA

Are you interested in forming your own RIA, but your options are limited?

Our established breakaway solution can actually help you grow...while giving you the ability to maintain true independence. Advisors can confidently outsource back office tasks while utilizing our comprehensive practice development, coaching, and marketing program to help them attract even more business. It's your roadmap to success.

What Happens to My Staff?

When advisors partner with FocusPoint, they discover newfound time to focus on their core strengths and passions—and their staff experiences the same. Our unique support model gives advisors the freedom to run a highly efficient business with built-in capacity for growth and a relatively low number of staff.

Many of the advisors we work with employ incredible people who are fundamental to their business operations and client relationships. Through our outsourcing partnership, advisors are liberated from administrative tasks to focus on client-facing or other business-building activities. We've found that this shift can be truly motivating to these valuable team members.



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