



## REMOTE CLIENT SERVICE ASSOCIATE (RCSA) PROGRAM

COLLABORATIVE PARTNER IN YOUR INDEPENDENCE

As an Independent financial advisor, the most valuable resource you will ever have is your time. How you choose to invest your time can drive growth in your business, much like how you choose to invest a portfolio for your most valued client. Spire's **RCSA Program** can integrate a knowledgeable, and well-trained professional into your practice day one to tackle the administrative tasks your business requires to operate. By adopting a delegation work model through RCSA, you are free to invest more time in things that add value to your practice and your life.

Successful independent entrepreneurs invest their time in things like:

- Networking for new clients and referrals.
- Reviewing the markets and the universe of investments for opportunities to add value.
- Engaging in meaningful client interaction and forging closer relationships.
- Building a brand and adding reputational equity to the business.
- Focusing on pursuits that enrich life outside of work.



### SPIRE'S RCSA PROGRAM

Spire's **RCSA Program** is an investment in your business that helps free you up for growth by managing the necessary flow of administrative work areas without a massive investment of your time. Spire's RCSA specializes in:

- Creating and managing the paperwork side of onboarding new clients in your practice.
- Helping you prepare for client reviews by producing meeting agendas, performance reports, and notes on recent client interactions.
- Maintaining a book of business by processing account updates, handling client cashing needs, trade order entry, and executing routine back-office processes.
- Managing a calendar that meets your needs, scheduling client appointments, and relationship calls.
- Working as a friendly and customer service-oriented point of contact your clients can talk to when you are indisposed.

Being an entrepreneur and running an independent financial practice is not easy. Fortunately, getting up and running with the **RCSA Program** is quite simple, much more affordable than a full-time employee, requires less time than training and managing a new associate, and can immediately begin to add value in your practice. Spire's **RCSA** will free you up for high value tasks and incorporate a well-rounded client service experience into your independent financial practice.

We would welcome the opportunity to discuss more about how the **RCSA Program** can add value to your practice today.



*One of my concerns while transitioning to a new firm was the task of looking for, hiring and training an administrative assistant. I had gone through the process before and was aware of the countless hours it can take to fully bring someone on board and be comfortable with the work they are doing. Spire's RCSA program offered a registered associate with previous industry/market experience, who is already knowledgeable of Spire's policies and procedures, operations, compliance, and billing. This allowed me the time to focus more on my transition, and it gave my client's an immediate solution to their needs after coming over as well. The RCSA program offers a structured process and reduces the need for additional ongoing expenses that come with hiring a full time employee.*

### About Spire Investment Partners

Spire Investment Partners is a turnkey resource for financial advisors who desire products, services and technologies to grow their practice. Since 1997, Spire Investment Partners has offered solutions that enable advisors' independence and entrepreneurship. Our framework for success revolutionizes the ways advisors are supported and supervised.

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