Advisors Job Functions List
Helping Advisors Manage Their Business and Serve Their Clients

The most important thing you should do before (or directly after) you hire **Total Office, Inc** is to decide what you need help with. To help you decide what tasks you may want to hand off we've provided a **sample list** of tasks that we can help you with.

1. Review the list and cross off those tasks that don't apply to your office; add ones that are missing from the sample list.
2. Decide what you don't want to do, have time to do or know how to do. These are the functions you should consider outsourcing to **Total Office, Inc.**

Client Service & Account Admin Support Tasks

- Manage email | voicemail | faxes.
- Schedule Client Meetings
- Client Meeting Prep: Gather documents | prepare | scan | upload | print reports & | Setup Conference call or Web sessions
- Process post meeting notes and tasks.
- Handle client service issues and communication needs.
- Keep client database | spreadsheets Custodian accounts updated.
- Setup and process new clients.
- Prepare, review & process account applications | TOA's | IRA's | RMD's and etc.
- Follow-up and troubleshoot account setups/transfers and other account problems.
- Process cashiering and money movement requests.
- Trading under advisor direction.
- Process Alternative Investments.
- Check current account balances for clients recurring withdrawals.
- Prepare Insurance and Annuity forms
- Client billing, invoicing and fee submissions.
- Download | print | mail or upload portfolio reports.
- Set up workflows | processes | CRM and client portals

Marketing Support Tasks

- Implement marketing plan.
- Process incoming leads | prospects
- Manage & maintain database | CRM | drip marketing system.
- Website development and maintenance
- Post and manage blog posts
- Setup | post | manage social media platforms
- Setup and manage email campaigns, templates, auto-responders and etc.
- Setup and manage editorial content & calendar.
- Content Creation
- Copywriting | proofing | editing: Articles, blogs, website, newsletters and etc.
- Create shareable graphics for social media.
- Develop | manage | monitor online presence and reputation.
- Research for articles and blogs.
- Setup | manage SEO for website | blog posts
- Print/assemble/mail traditional marketing packets.
- Set up & manage webinars | conferences.
- Create material & schedules for Webinar | conferences.
- Setup | maintain | process merchant services
- Other: _____
- Other: _____
- Other: _____
- Other: _____
- Other: _____

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