Unlocking Success: Navigate Wealth's Comprehensive Support for Advisors

Independent advisors face unique challenges in scaling their businesses while maintaining the personal, high-quality service their clients expect. At Navigate Wealth, we provide the operational support, technology, and resources you need to grow your practice with confidence, efficiency, and peace of mind.

How We Help You Succeed

1 Business Development & Marketing Resources

What We Offer: We manage essential back-office tasks, including compliance, trading, investment research, and performance reporting, so you can focus on high-value activities like client acquisition and personalized service.

The Benefit: Free up time to grow your practice, deepen client relationships, or plan for the future—knowing the operational details are handled by experts.

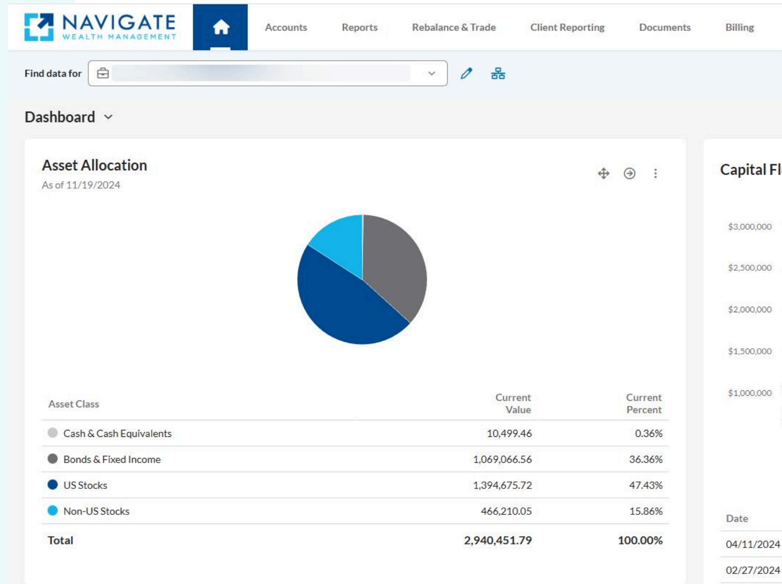
- ✓ Portfolio Management and Operations
- ✓ Marketing Programs and Support
- ✓ Client Management and Process Support
- ✓ Technology Setup and Support
- ✓ Business Continuity Planning
- ✓ Compliance Management

2 Operational Support to Maximize Your Time

What We Offer: Access tools like our "Second Opinion" portfolio review and personalized business development coaching to attract new clients, build your brand, and position your practice for growth.

The Benefit: Expand your client base and reinforce your value in the market with resources that make your independent practice competitive against larger firms.

3 Advanced Technology and Client Management Tools



What We Offer: Navigate Wealth provides a powerful tech stack, including platforms like Salesforce and Tamarac, designed to simplify client management, reporting, and portfolio analysis.

The Benefit: Operate more efficiently and confidently, with technology that supports your practice at every stage—whether you're growing, maintaining, or transitioning.

4 Streamlined Onboarding for a Strong Start

What to Expect: From day one, we collaborate with you to implement a scalable, efficient tech stack and integrate systems tailored to your practice

The Benefit: Get set up for success immediately, allowing you to focus on client relationships and strategic growth.

Marketing Plan Review	Ideal Client	Brand Guide	Client Service Model	Website	Marketing Coaching
Custodian Setup	Master Account Setup	User Setups	Service Team	Transfer/linking of Client Accounts	Electronic workflows/ forms
Compliance Setup	Registration	Disclosure Documents (Form ADVs)	DBA Setup	Initial Disclosure	Quarterly & Annual Compliance
Portfolio Setup	Portfolio Models	Investment Policy Statement	Risk and Return Projections	Securities Selection & Implementation	Benchmark Setup
Tech Setup	Microsoft 365	Tamarac	Salesforce	MoneyGuide Pro	Electronic Marketing Program
Navigate Process Review	Client Engagement Agreement	Client Onboarding	Quarterly Reporting	Fee Collection & Payments	Cash & Trading Requests
Client Growth	Total Client Profile	Second Opinion	COIs	Professional Network	Virtual Family Office

Why Advisors Choose Navigate Wealth

At every stage of your career, Navigate Wealth provides the support you need to scale, serve, and sustain your practice. From personalized onboarding to continuous operational and strategic support, we meet you where you are—whether you're growing, maintaining, or planning for transition.

By partnering with Navigate Wealth, you gain the freedom to focus on what matters most: your clients and your life outside of work. Let us handle the details, so you can lead your business with confidence and peace of mind.

Ready to simplify your practice and focus on growth?
Reach out at www.navigatewealth.com/for-advisors
and let's schedule time to talk.