

Operational Services

Are you spending time on tasks that keep your business running but not growing?

As a Wealthcare advisor and business owner, you can utilize WealthcareGDX to outsource day-to-day operations to optimize your business. Delegate those time-consuming back office tasks to our skilled team of professionals, so you can work on your business and not in your business.

OPERATIONAL SERVICES (fee applies to all Advisory Assets)*



Money Movement - Journaling, ETFs, Wires, and Check Requests. Cash raise requests can be handled if you are using Wealthcare models.



Preparation of Custodial Paperwork - New account forms, transfers, account maintenance and estate settlement (advisor to provide data and obtain client signature)



Client Agreements - Preparation of Wealthcare Client Agreements



Obtaining eSignatures - Send Docusign paperwork to clients on behalf of the advisor



Account Paperwork - Submission of account paperwork to custodian



Not In Good Orders (NIGOs) - Follow-up with custodian to ensure processing is completed including resolving NIGOs (may require advisor involvement to get new signatures, etc.)



Custodian Liaison - Work directly with custodian's service team to obtain answers on issues and ad-hoc questions



Operational Inquiries - Other general and processing item inquiries

*10bps on all advisory assets managed by Wealthcare or Advisor. 10% of revenue on all 3rd party managed Assets

**IPT Creation, Scheduling and Client Communication are not offered as part of Wealthcare's Operational Services. Wealthcare does not provide services on brokerage business.



Two James Center, 1021 East Cary Street, Suite 1120, Richmond, VA 23219
(804) 644-4711 | WealtcareGDX.com