Virtual Assistant Sample Tasks

The biggest small business challenge is to conquer the act of delegation. Effective delegation requires a full understanding of whom you're working with and why you're working with them. Take a look at how Nifty Advisors utilize the best of NIfty and the benefit of putting delegation first as a successful financial advisor!

Digital Marketing

Website

- Optimize web pages and blog posts for SEO
- Copywrite and edit web pages
- Troubleshoot common website questions

Email Campaigns

- Automate and trigger a single or series of emails to welcome subscribers, capture leads, or engage clients
- Create targeted emails
- Create meeting request emails
- Develop custom landing pages
- Format and publish pre-written content

Social Media

- Set up social media accounts
- Create social media covers
- Copywrite bio and descriptions
- Develop hashtags
- Post created or curated content on a recurring basis (with advisor approval)
- Support LinkedIn, Facebook, Twitter, Instagram, YouTube, Google My Business, Tiktok, Pinterest, and Twitch

Digital Assets

- Ideate and create digital deliverables such as brochures, cover art, internal facing documents, digital magazines, letterheads, social media graphics, infographics, and presentations
- Adopt digital assets into your existing marketing workflows

Podcasts

- Manage publishing schedule
- Develop and publish professionally edited podcast episodes
- Add intros and outros
- Reduce background noise
- Trim and remove 'ums', 'ahs', and restarts
- ID3 tagging
- Add music, sound effects, and edits at specific timestamps
- Create and add custom podcast cover art

Client Servicing

Custodian and Investment Operations

- Pre-fill, send, and track custodian eletronic paperwork
- Call custodian to troubleshoot and clear NIGOs and Alerts
- Manage custodian account updates, transfers, money movements, and ongoing maintenance requests
- Calculate cost basis (with advisor approval)
- Confirm cash availability for trades
- Calculate and submit invoices for billing (with advisor approval)
- Manage portfolio management system(s) such as linking accounts, householding, and miscellaneous data input
- **No investment trading allowed**
- **No hard mailings allowed**

Meeting Support

- Send and confirm via online scheduling
- Prep and send meeting agendas and notes
- Gather preliminary info for meetings
- Run and share advisor and client reports
- Confirm the completion of prior meeting action items
- Capture new meeting follow up actions

Compliance

- Monitor ongoing compliance calendar
- Audit critical client database information
- File and organize documents
- Create and input CRM data
- Prepare and distribute ADVs
- Audit and update client agreements

Communication

- Manage outbound calls to clients and prospects (limited support)
- Communicate with TAMPS, contra firms, and third-party providers (with advisor approval)
- Prepare bulk email communication
- Troubleshoot IT issues
- Provide additional communication support for urgent items while away
- **No advisor email inbox monitoring allowed**
- **No lead qualifying allowed**
- **No receptionist services allowed**

Administration

- Create fintech or provider comparisons
- Manage email and contact lists
- Manage birthday and meeting lists
- Recommend software and service providers

Paraplanning

Client Onboarding

- Review documentation and notes for data input into planning systems - eMoney, MoneyGuidePro, RightCapital
- Create client and household profiles
- Link and review incoming held and held-away accounts for accuracy
- Review individual holdings by account
- Input data for initial and ongoing plan reviews
- Update and maintain planning assumptions (Planning Plus Only)
- Develop a financial plan one-page summary or full plan deliverables (Planning Plus Only)

By Strategy | Retirement (Planning Plus Only)

- Maximizing social security
- Analyze and calculate RMD calculations
- Analyze cash flow, income, and expenses during retirement
- Create distribution strategies

By Strategy | Taxes (Planning Plus Only)

- Create income and estate tax projections
- Analyze capital gains tax strategies

By Strategy | Cash Flow and Debt (Planning Plus Only)

- Analyze budget and spending
- Create cash flow projection
- Analyze emergency savings
- Strategize refinancing options
- Create payment plan strategies
- Analyze and monitor debt-to-income ratio

By Strategy | Beneficiaries (Planning Plus Only)

- Audit account beneficiaries
- Update beneficiaries based on major life events
- Audit beneficiaries per stirpes or per capita

By Strategy | Investment (Planning Plus Only)

- Align risk tolerance and investment allocations
- Create rebalancing recommendations
- Ensure recurring income needs are met, and if not, how they can be met

By Strategy | Insurance (Planning Plus Only)

- Review and audit insurance needs
- Conduct insurance gap analysis
- Conduct group v. individual insurance comparison

Ongoing Support

- Review past recommendations for accuracy (Planning Plus Only)
- Update planning system(s) based on major life events or planning reviews
- Ensure completion of past planning reviews and capture actions
- **Collaborate with the Client Servicing team for complex household updates (must be a Client Servicing Only client)**
- **Collaborate with the Digital Marketing team to develop your niche marketing strategy (must be a Digital Marketing client)**