



We Grow with You

Congratulations on your new independent RIA firm! As you navigate the first few months of your young RIA firm, there are a lot of important legal and business setup requirements. Like most startups, costs tend to outweigh revenue at this stage and spending money on professional advice feels like a ‘want’ and not a ‘need’.

At Elevate RIA Advisory, we can work with your breakaway RIA firms as you grow and offer flexible pricing to help manage costs whilst getting the support and advice you need:

	Services	0-6 Month Startup Period	7-12 Months from Fully Established	1yr +
Starting at \$500 per mo.	Growth Strategy Meeting	X		
	Books & Records Rule <ul style="list-style-type: none"> • Bookkeeping • Setup QuickBooks* online with Chart of Accounts *QuickBooks discounted rate	X		
	Tax Entity Review and Setup	X		
	Firm Tax Return (preparation)	X		
	Responsiveness to Questions	X		
	Elevate Independence Alliance access for business setup	X		
Starting at \$1,000 per mo.	Q1: Plan for upcoming years tax and business goals		X	
	Q2: Review financials and goals, setup succession planning KPIs, growth goals and address issues		X	
	Q3: Truelytics implementation, review and set goals, outline steps for achievement		X	
	Q4: Tax planning and following year planning and achievement plans		X	
Starting at \$1,500 per mo.	Future growth strategy meeting and agree on goals, support and implementation. May or may not include the following services: <ul style="list-style-type: none"> • Annual Analysis of the Firm Valuation • Fractional CFO • Accounting + Tax Return Preparation • Cash Flow Planning and Projections • Managed Fee Calculation Review • Industry Benchmarking • Compensation Planning • Personal Financial Statements 			X

Take advantage of our expertise to support your breakaway RIA firm. Let's talk about how we can grow and be successful together.