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My Assistant

Program Overview & Info Session

osaic

Meet My Assistant

Meet My Assistant, a program designed to free up your time by giving you access to a trained Osaic home office employee to complete a variety of your administrative tasks at your request.

Variety of Tasks

My Assistant handles account opening and maintenance, obtaining signatures, and entering data.

Flexibility

You choose how many hours you need weekly, which are billed in quarter hours for actual time worked.

Less to Worry About

Osaic takes care of taxes, vacation and sick days, worker's compensation, and employee benefits for the Assistant.

What Tasks Can My Assistant Support?

- Paperwork preparation for new account set up
- Document submission and processing
- Account follow up
- Transfer processing and monitoring
- Account maintenance
- Research action needed or NIGO items
- Money movement requests

Program Details

Billing & Cost

- $50 Per Hour – Billed in 15 Minute Increments
- No additional costs or fees including enrollment, cancelation, or inactivity fees or charges.
- Billing is submitted through Commissions on a weekly basis.

Your Assistant

- Once enrolled, you will be assigned to an individual Assistant.
- Submitted work and inquiries are sent to your Assistant via email.
- Your Assistant will confirm receipt of your email and begin working your request.
- Your Assistant will follow up with you once they have an update or they have completed your request

Flexibility

- No required minimum usage, and you only pay for what time you use when you need to use it.
- Email boxes are shared throughout the My Assistant Team for enhanced coverage and support.
- Your Assistant can work with your office team, including your in-office assistant to receive requests and communicate updates.

How to Use My Assistant

The My Assistant Program assists with the completion of many back office and administrative tasks. Below is an example of the experience of submitting a common request and how the program can save you time.

FP Starts a Request

- Gather all necessary information to complete the task
- Submit request to your assigned Assistant via email

Request is Reviewed by Assistant

- Upon receipt of request, your Assigned Assistant will review the request and prepare to act.
- Your assistant will reply to confirm receipt of your email.
- Your Assistant will reply with any clarification, questions, or concerns identified to prepare them to complete your request.

My Assistant Goes to Work

- Complete & Submit Request in System
- Watch for Follow Up
- Research NIGO and follow up if any action is needed.
- Follow up on approval
- Send Docs to client via eSign
- Update FP on status and completion, or if any action is needed from FP.

Tasks Currently Outside My Assistant Scope:

The My Assistant program is continuously growing. Should you have a request that is not listed below, please reach out to your assigned assistant to see if we can accommodate.

- Direct communication with clients
- Rightbridge Processes
- Placing trades or raise cash
- Sponsor Transactions or Annuities
- Completing business correspondence
- Scheduling or confirming meetings
- Performing money movements on accounts held outside of Pershing/NFS
- Creating SIS or Proposals within WMP

Enrollment Steps & How to Get Started

Complete Program Agreement

Sign and Return our Program Agreement. Once we receive your agreement, you will then be assigned an Assistant who will reach out to introduce themselves and share next steps.

Meet Your New Assistant

Your new Assistant will schedule a meeting for introductions and to discuss how they will support and work with you going forward.

Start Sending Requests

Any work you would like your Assistant to complete is sent in via email. Your Assistant will confirm receipt and follow up with you once they have an update or the request is complete

Billing Submitted Weekly

Billing is submitted on a weekly basis to the commissions team. Charges will appear on your statement as “My Assistant” for work completed the week prior.

Ready When You Need Us

Your Assistant is ready to assist when you need their help. There is no minimum usage requirements for the program, and no additional fees for inactivity; you only pay for the time you use, when you need to use it.

MY ASSISTANT TESTIMONIALS

"We use My Assistant for most of our new paperwork and related administrative tasks. We provide them with basic client info and they complete the rest from sending DocuSigns to clients, to making sure follow-up compliance items are completed."

"Our advice to a new user of the program would be to figure out which parts of the administrative process they dislike doing the most, and outsourcing those tasks to the program."

"We are very thankful to have Donna by our side and acting as an advocate for our team!"

Q & A

Start saving time with My Assistant

For more information, contact us at myassistant@osaic.com