

Less Admin, More Advising

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Why Choose Financial Gravity as Your Family Office Partner?

When you choose Financial Gravity as your Family Office, you gain more than just a RIA, you gain a full-scale operational partner dedicated to supporting your growth, simplifying your systems, and helping you deliver unmatched value to your clients. Our commitment is to remove friction from your daily operations so you can focus on what matters most: building relationships, offering expert guidance, and growing your practice.

Built for Family Office Directors

Financial Gravity's model is designed specifically with **Family Office Directors** in mind. We understand the unique needs of advisors who want to scale their businesses without sacrificing quality or compliance. That's why we offer a fully integrated operational platform backed by a team of specialists across technology, marketing, compliance, client services, and back-office support.

Comprehensive Operations Support

Our **Operations team** is the engine that powers your Family Office behind the scenes. We focus on streamlined operations, so you have more time for what matters most, your clients and your business.

- Seamless client onboarding with compliant CRM setup and organized files
- Direct coordination with tax, insurance, legal, and investment partners
- Efficient ticketing system and client access for service requests
- Pre-approved forms, engagement templates, and branded materials
- Customized CRM workflows, including automated annual reviews and RMD tracking
- Proactive alerts, task management, and data integrity oversight
- Secure document handling, audit trails, and compliance support
- License number management and state/SEC regulatory alignment
- Continuously updated Knowledgebase and resource library

We Handle the Heavy Lifting

At Financial Gravity, we believe your time should be spent doing high-value work—not chasing paperwork, formatting emails, or managing disconnected systems. When you choose us as your Family Office partner, you're choosing a team that's dedicated to making your operations **frictionless, compliant, and client-ready** from day one.

This documentation is provided by Financial Gravity Family Office Services, LLC for instructional purposes only. It serves as a general guide to help you understand the onboarding process. Please do not share sensitive information through unsecured channels.

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