



Client Service Solutions

The Cue platform draws on over a decade of RIA experience providing comprehensive financial services to a wide variety of clients, including individuals, business owners, related retirement plans and charitable entities. Leverage our experience and resources to elevate your service model and establish a holistic, client-centric approach.

FULL SERVICE PATH

Escape the time-consuming process of hiring and developing your own client service staff by utilizing experienced and dedicated Cue client service specialists. We will take on the backstage work so that you and your advisors can focus on developing deeper connections with existing and potential clients.

We provide full support with opening accounts, managing the funding process and seeing to the day-to-day needs of your client base in conjunction with you and other advisors within your practice. Following our own processes and procedures, we will deliver the same exceptional client service that we have provided our clients over the past decade.

- Complete support
- We serve as your client service staff
- Full-service account administration

SUPPORT PATH

Harness the power of our experience and processes. With our Client Service Support Path Solution, you can acquire the knowledge and skills needed to establish a high-end client service model.

We train your team on our streamlined processes, including the efficient management of day-to-day client service tasks and effective troubleshooting methods. We serve as mentors for your team, helping them stay agile and prepared to serve your evolving client base.

- High level of service
- Guided methodology
- Hands-on training
- Assistance with complex account set-up

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