



Wealth and asset management business solutions

Optimize your firm with the right business strategies

You built your business with your passion and drive. But success isn't enough. You want to thrive.

But how do you juggle your clients' concerns over protecting and growing their wealth with your leadership team's vision for the direction of the business?

As your firm moves through its lifecycle, you need an ally that can help you avoid the traps that will undermine your growth. Wipfli can help by guiding you to:

- Focus your vision and strategy
- Scale your growth with the right people and technology
- Drive decisions with real-time data
- Establish organizational alignment with leaders and teams
- Create a culture of agility and innovation

71% of managers are not aligned with the vision

75% of RIAs have integrated technology systems

We know what it takes to build a business and ride a wave of expansion in a world that's rapidly changing – because we've done it. Let us put that knowledge to work for you.

WIPFLI

Solutions at every stage

Your firm's needs shift as you hit different stages in its lifecycle. Our industry-specialized team of professionals will perform a rapid assessment to determine whether you're in the creation, acceleration, transition or legacy stage and what solutions you need now to drive your success for tomorrow.

Our holistic solutions include:

Business consulting

We uncover opportunities involving data, people, strategy and technology that can drive your success. Our team specializes in:

- Strategic planning
- Operations consulting
- Transition planning
- Mergers and acquisitions consulting
- Transaction readiness consulting
- Market value assessment

Finance and accounting

With Wipfli's CFO Connect, we turn numbers into actionable insights that drive proactive, strategic decisions, with services in:

- Outsourced CFO
- Outsourced controller
- Outsourced accounting department
- Tax planning and compliance
- Audit, surprise custody audit and GIPS

Talent and change management

We help you craft an agile strategy and manage people, payroll and benefits, with services in:

- Organizational structure
- Recruiting, hiring and retaining leaders
- Compensation planning
- Payroll and benefits
- Optimizing your team

Technology consulting

We discover and deploy digital solutions that help you leverage digital strategy to drive engagement, collaboration, efficiency and growth, with services in:

- Digital strategy and planning
- Business intelligence/data analytics
- CIO advisory/IT strategic planning
- Cybersecurity
- Business continuity and incident response
- Financial systems
- CRM systems

Regulatory compliance

Our team provides practical solutions that support and monitor compliance issues and help develop policies and train employees. We:

- Provide compliance support for new products, services and marketing campaigns
- Perform routine compliance monitoring and provide solutions to issues detected
- Assist with compliance policy and procedure development
- Provide assistance with compliance due diligence for mergers and acquisitions

Let's get started

Contact us today to get your free organizational assessment.

wipfli.com/WAM