

PINNACLE'S TRANSITION CONCIERGE SERVICE

We understand that change is good but it doesn't come without a certain amount of anxiety. Let us take the stress out of your transition by providing a reassuring "hands on" approach every step of the way. It is crucial for your business to continue without interruption and our Transition Team is dedicated to eliminating any obstacles to your success.

Communication is key. You will have immediate access to our Transition Team leading the whole process. You will be able to focus on what is most important, your clients. We will handle the rest.

- Initial Transition Team Call with department leads to learn about your business and create a plan that works best for you and your clients.
- Customized client packages with all the necessary forms and information to open and transfer client accounts.
- Daily reports on distribution of client paperwork, receipt and transfer status.
- Marketing assistance with transition and welcome letter, announcements, internal and external communications , etc.
- Access to SmartStation®, DocuPace workflow management system, appropriate hardware and software, email, general technical support and training so you are ready when you need to be.
- A compliance team focused on streamlining registration and licensing to get you up and running in the shortest amount of time.