

HR Solutions to support and **evolve your business**

We understand that managing human capital can be one of the most challenging aspects of running a business. That's why we offer a wide range of people-centric solutions designed to meet the unique needs of your wealth management business. From core HR practices to business growth strategies, we are committed to providing you with the tools and resources to succeed.

Serving Wealth Management Firms and Advisors

Core HR Processes

- Hiring and onboarding talent
- Performance management
- Compensation plan design
- Hybrid work approaches
- Handbook and policies
- Recognition and reward
- Data and metrics
- Offboarding talent

Workforce Strategy

- Succession planning
- Org design and transitions
- Career path design
- Employee engagement and feedback solutions
- Advisory councils
- Effective communication
- M&A Integration – aligning people, process, and culture, with a focus on retention
- Culture renovation

Developing People

- Manager foundations
- Developing talent
- Leadership development
- Soft skills training
- Executive coaching - amplify impact and achieve sustainable results
- Team development and integration
- Team problem solving
- AI tools and where to use



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YOUR HR PARTNER

Outsourced HR Solutions

Fractional HR Leader