



ARE YOU AN ADVISOR **LOOKING TO SAVE TIME?**

Premier Network of Financial Advisors can take care of your small accounts.

SMALL ACCOUNT SOLUTIONS

Managing small accounts can take up valuable time that could be better spent growing your business. Premier Network's Small Account Solutions (SAS) allows you to serve these clients efficiently—without the administrative burden.

By partnering with us, you can ensure your clients receive high-quality service while freeing yourself to focus on larger accounts and new opportunities.

Let us handle the details so you can maximize your time and revenue.

SAVE TIME, STAY FOCUSED

When you join Premier's Network of Financial Advisors you become part of a dedicated team that puts exceptional service first.

Here's Why You Should Choose Premier

- The guidance to help you grow
- The independence you need to thrive
- The support you need to succeed
- The service you deserve to experience
- The experience of over 25 years in the business
- The stability of partnering with a larger broker-dealer



**READY TO
TAKE THE
NEXT STEP?**

**CONTACT OUR
TEAM TODAY**



800-784-2266

717-737-2001

communications@premiercir.net

www.premierphub.net

HOW SAS WORKS:

SEAMLESS ACCOUNT MANAGEMENT

- We handle small accounts so you can focus on growing your business

BENEFICIARY & DECEASED CLIENT ASSISTANCE

- We manage asset transfer and beneficiary account setups, keeping investments intact.
- If assets remain, we use a **75% (Premier) / 25% (FP) split at a 1% fee**; if they leave, hourly assistant rates apply.

EFFORTLESS ONBOARDING

- Our team completes the entire onboarding process for referred clients.

KEY FEATURES & BENEFITS:

- All accounts opened at SEI, ensuring a flexible, no-minimum, fee-based platform for both NQ and IRA accounts.
- Clients receive access to Savology and CLIC Client for financial planning tools.
- Annual Review conducted by Premier to maintain account performance.
- Ancillary business is referred back to the introducing FP; if they prefer not to handle it, Premier can manage it instead.
- Option to add clients to Premier's email drip list to keep them informed.