REVA
SOURCE

Refined **E**xecutive **V**irtual **A**ssociates

“Professionals Serving Professionals”

The REVA Source mission is simply our Team providing Clients and Investors with the very best services with a superior experience.

Yeah, I know - everybody says that. What is different with REVA is the services and experience we provide are essential to our model. We rely on retention and referrals, and this can only happen if we exceed expectations with our Clients. So, our success, and more importantly, *your* success, depends on it!

Custodians

- Schwab
- TD Ameritrade
- Fidelity
- Raymond James
- Pershing
- American Funds
- Betterment
- Alternatives
- and many more…

CRM’s

- Redtail
- Wealthbox
- Advyzon
- Junxure
- Salesforce
- Keap (InfusionSoft)
- HubSpot
- Zoho
- and many more…

REVA Source Helps Generate Revenue

Account Management

- Financial Forms/Docs
- Transfers/Tracking
- Alert Management
- Processing Requests
- Money Distributions, Contributions, Withdraws
- Address, Beneficiaries, Name Change
- Rollovers, RMD’s, IRA’s
- Custodial Management
- And so much more!

Advisor Support

- CRM Management Transitions
- Custodial Transitions
- Custodial Alert Management
- New Advisor Transitions
- Client Documentation
- Calendar and Scheduling
- Email Triage
- Compliance Documents
- Pre-meeting prep
- Post-meeting transcription
- And so much more!

Client Management

- Email Triage and Task Assignment
- Documentation
- Scheduling
- Client Portal Management
- Meeting Surges - Client Reviews
- Portfolio Management
- Client Appreciation
- Account Updates
- Comprehensive Services
- And so much more!

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