

For RIAs and Advisors transitioning platforms, the risks involved with moving can sometimes outweigh the rewards. Overwhelming complexity, constant confusion, and the very real dangers of poor communication with clients can often make the opportunities of moving to a superior platform feel too hazardous to endure.

At Fusion, we recognize your most important relationships - those with your clients and team – simply cannot be compromised when pursuing growth.

Our **Firewall Transition Process** rigorously guards your professional reputation, client relationships, and focus on priorities, so transitioning can simply be the start of something great. We provide a comprehensive approach that includes meticulous attention to detail, the industry's lowest error percentage, and a robust communication program so your move is a win for all parties.

1

One Specification

We craft a thorough and customized plan that intersects your specific training, tech, and client communication needs with specific on-boarding timelines.

- Support needs
- Documentation routines
- Error and ticket formulas
- Communication guidelines
- Training resources
- Technology training needs
- Branding requirements
- Action plan for on-boarding

2

Two Verification

Together, we review and adjust the elements of your plan and formalize our agreement of shared responsibilities, work routines, timelines, and communication protocols.

3

Three Activation

We attack the plan by preparing every single detail prior to migrating. We initiate all pre-flight client communication plans including on-boarding events, webinars and emails. We finalize all documentation and activate all technology components and trainings for your team.

4

Four Migration

We breach the firewall and initiate full migration protocols beginning with client communication, trouble ticket management, and ad hoc service requests. Fusion representatives support you at every step including signing parties, webinars and dedicated support and escalation procedures.

5

Five Validation

During the period following the initial migration, a total process audit and review is conducted to ascertain any gaps to be filled and progress attained. We pursue our shared goal of seamless integration until it is achieved.

Security. Support. Speed.

The Firewall Transition Process