



# INTEGRATED CONSULTING & ADVISORY SOLUTIONS

“PUTTING THE PIECES TOGETHER”



## The Essentials Package LACP Discount: 25%



60+  
Workflows



Group Office  
Hours



Pre-recorded  
Trainings



Private LACP /  
ICAS Community

To learn more:  
[support@integratedcas.com](mailto:support@integratedcas.com)



## EXAMPLE ICAS WORKFLOWS

### Prospecting/Networking

- Prospects
- Networking Follow up's
- Event Follow up's
- Former Prospects

### Client Appointments

- Mid-year reviews (in person and phone)
- Annual reviews
- Group Retirement Plan Enrollment meetings

### Client Service

- Beneficiary Changes
- Roth Conversions
- Various Direct and Brokerage account service
- Redemptions
- Check processing
- Transfer of Assets
- 529 Processing

### Financial Planning

- Data entry into FP software
- Client facing software setup
- FP Delivery & Compliance
- Financial Planning Engagement execution w/ client

### New Account Setup

- SoloK
- Qualified Plan Design
- IRA/Roth IRA
- Taxable
- Variable Annuity
- SEP
- 529's

### Insurance/Risk Management

- Review of Client Current Policy
- New Policy (Life)
- New Policy (Disability)
- Increase in coverage w/ Medical Exam (Life & Disability)

### Estate Planning

- Review Client Current Estate Plan
- Update Accounts d/t New Client Estate Plan
- Update Life policies d/t New Client Estate Plan

### Referrals & Follow Up's

- Various client referral and introductions
- Client Implementation follow-up and accountability processes