

Specialized Protection Services for Advisory Wealth Management Firms

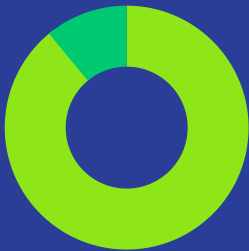
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Why Your Advisory/Wealth Management Clients Need Specialty Services?

Our goal is to help you deliver high value lifestyle services to your Advisory and Wealth Management clients. Brightly enhances client engagement with impactful and timely services, enabling you to better understand and meet your clients needs, build trust and distinguish your offerings, and increase your reputation and employee retention. Our service offerings can be bundled to create a broader protection package for your team. We offer a full suite of comprehensive services for advisory firms to protect their clients from natural disasters, to caregiver stress, to COVID-19, to cyber security and protection.

Is your bank doing everything it can?



89% of people use mobile banking for at least some of their banking services.

What Speciality Services are Included?

COVID-19 SERVICE

The global pandemic has changed operating models around the world. Our COVID-19 Commercial and Personal services help your clients adapt to this new normal with unbiased and vetted information resources that support their lives and businesses.

FAMILY CYBER PROTECTION AND SECURITY

Research shows 89% of people use mobile banking apps and this carries risk. We can analyze your client's digital footprint and identify any weak links. We help resolve any existing threats, and protect against future ones. If a breach occurs, we offer urgent assistance, fraud resolution, document replacement, and more to help your clients recover quickly.

NATURAL DISASTER AND FLOOD PREPAREDNESS

We look across your clients' properties and assess the risks for floods and natural disasters. We will provide guidelines and tools to prepare for a possible disaster, and even help them recover and organize property claims and paperwork should the unimaginable happen.

FAMILY CAREGIVER SOLUTIONS

We provide support services and resources to help your clients when someone becomes a full or part time caregiver to a loved one. Our services help them manage their loved one's medical needs, keep track of finances, and manage their own stress..