

RIA Out of the Box Launches Enhanced Compliance Services with a Turnkey Solution Including Cost Reimbursement

Offering RIA registration, ongoing compliance support, and cost reimbursement

WASHINGTON, DC, UNITED STATES, January 15, 2025 /EINPresswire.com/ -- [RIA Out of the Box](#)™ announces the official launch of its game-changing services designed to provide registered investment advisers (RIAs) with a way to launch and maintain an RIA. RIA Out of the Box™ is a fully turnkey solution that not only files the RIA registration, but provides, among other highly valuable offerings, an adviser's business with confidential compliance support; confidential, privileged and affordable legal services through an independent law firm, cutting-edge technology, a vetted investment platform, and comprehensive marketing tools.



RIA Out of the Box provides:

- RIA Registration: We assist advisers through the full RIA registration process ensuring that all regulatory requirements are met, and that the RIA is successfully up and running.
- Ongoing [Compliance Services](#): Our platform provides continuous, high-quality compliance services, including regular audits, day-to-day compliance issues such as approval for marketing content and that emails, texts, and social media are compliant. A unique aspect to our firm is the fact that important communications made through a third-party law firm supportive of RIA Out of the Box clients, will fall under the attorney client privilege and should not be discoverable by regulatory bodies or as part of legal disputes. Our turnkey solution allows advisors to focus on serving clients and finding new clients while having the confidence they are staying fully compliant.
- [Cost-Reimbursement](#): Whether firms spend \$5,000, \$10,000, even \$50,000 or more on start-up or ongoing compliance services, through our unique offering, these costs can be reimbursed up to 100%.
- Top-Tier Billing, Trading, and Reporting Systems: RIA Out of a Box™ optionally offers the industry's leading billing, trading, and reporting systems, designed specifically for RIAs. This powerful but simple system will be a refreshing change for those looking to get away from

cumbersome and expensive platforms.

- Vetted TAMP (Turnkey Asset Management Platform) Services: We optionally provide access to a fully vetted TAMP featuring the industry's best third-party managers and professionally managed multi-manager portfolios. Unlike other platforms, we do not use firms like AssetMark, Orion, SEI, or Envestnet.

- Qualified Plan Services: Advisors using our platform will have access to turnkey qualified plan services, including 401(k), profit-sharing, and defined benefit plans.

- Institutional Investment Services: Our platform includes access to institutional services, such as custom structured notes and Delaware Statutory Trusts (DSTs), and other sophisticated investments that many RIAs do not offer but would like to.

Transforming RIA Challenges into Opportunities

For those starting an RIA, we believe our offering is uniquely powerful (compliance, technology, TAMP). For existing RIAs who see compliance as a necessary evil, we can change that by providing better services that include attorney client privilege (something most firms lack) while also providing reimbursement for up to 100% of all related compliance and RIA creation costs.

Whether you are a startup or existing RIA, the ability to receive cost reimbursement for up to 100% of your compliance and RIA creation and registration costs, we know this will be appealing.

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