

SERVICE TIERS

Outsourced Operations, Scoped to Your Firm

Strategic operational support for RIAs and family offices — enhancing your firm's capabilities without the burden of full-time staff. Choose the level of support that fits where your firm is today.

Client Service Support

Starting at \$2,500/mo

- ✓ Client inbox & request management
- ✓ Scheduling & meeting coordination
- ✓ Meeting preparation & follow-up
- ✓ CRM & client records upkeep

Operations & Transaction Coordination

Starting at \$5,000/mo

- *Everything in Client Service Support*
- ✓ Wire & transfer request coordination
- ✓ Capital call administration
- ✓ Real estate transaction coordination
- ✓ Custodian follow-up & status updates

Dedicated Operations Associate

Starting at \$8,000/mo

- *Everything in Operations & Transaction Coordination*
- ✓ Dedicated task & workflow management
- ✓ Cross-client operational oversight
- ✓ Vendor & custodian coordination
- ✓ Ongoing process improvement

New to Working Together? Start With a 30-Day Pilot

Every new engagement begins with a 30-day pilot at a reduced rate — a low-risk way to confirm fit before moving to standard monthly pricing. No long-term commitment required to get started.

All services are administrative and operational. Zilen Financial does not provide investment advice, manage portfolios, or execute securities transactions — those decisions always remain with your firm and your custodian.

[Get Started](#)