BELAY

THE FINANCIAL ADVISOR'S DELEGATION GUIDE

THE FINANCIAL ADVISOR’S DELEGATION GUIDE

Delegation isn’t just for the overwhelmed. It’s a strategic move for growth-oriented financial advisors.

This guide will walk you through three practical exercises to help you identify what’s draining your time, what you should let go of, and how to free yourself up to focus on what drives revenue and client trust.

EXERCISE #1: **THE 80/20 RULE**

The 80/20 rule says 80% of your results come from 20% of your efforts. As a financial advisor, that 20% is likely:

- Client meetings and portfolio reviews
- Prospecting and relationship-building
- Strategic planning and market research

Now ask yourself: ***What tasks are stealing time from those activities?*** Things like:

- Scheduling quarterly reviews
- Entering notes into your CRM
- Chasing down paperwork
- Monitoring emails from platforms and vendors

These are important, but not worth your billable rate. Delegating these low-value tasks creates space for the high-value work only you can do.

EXERCISE #2: **THE 6 T'S OF DELEGATION**

Use these six T's to identify what you can (and should) delegate:

TINY | Quick tasks like calendar updates, confirmation emails, or inputting expenses.

TEDIOUS | Repetitive tasks like CRM maintenance, scheduling calls, or formatting presentations.

TIME-CONSUMING | Things like gathering compliance documents or preparing standard reports. Important? Yes. Worth your direct time? No.

TEACHABLE | Processes that can be trained, like onboarding new clients, preparing meeting packets, or managing lead funnels.

TERRIBLE AT | Maybe it's social media updates. Or reconciling receipts. Whatever drains your energy—delegate it.

TIME-SENSITIVE | Tasks that need quick turnaround but not your expertise, like last-minute scheduling changes or document chasing.

EXERCISE #3: DELEGATION MATRIX

Use this matrix to assess what stays with you and what needs to go.

	IMPORTANT	UNIMPORTANT
LOVE	**Keep:** Client strategy, financial planning, key relationships	**Release:** Tasks you enjoy but don't impact results (e.g., designing your own slides)
HATE	**Trust:** Important but dreaded tasks—like compliance prep or quarterly reporting. Document and delegate.	**Forget:** Admin and ops you hate and don't need to touch again.

NEXT STEPS: PROTECT YOUR TIME. PROTECT YOUR PRACTICE.

You've identified the work that's burying you: the scheduling chaos, the paperwork chase, the onboarding bottlenecks that pull you out of revenue-generating conversations and into the weeds.

Now comes the part most advisors get wrong: who you trust with it.

In wealth management, delegation isn't just about saving time. It's about protecting client trust, maintaining compliance and keeping your firm operating at a professional standard — without everything running through you.

That's exactly why BELAY matches leaders like you with Client Services Assistants built for your industry.

These aren't generic admins learning on the job. BELAY's Client Services Assistants are:

1. U.S.-based, background-checked and identity verified
2. Experienced in wealth management operations and finance workflows
3. Fluent in secure systems, compliance protocols and client-ready communication

They understand the stakes, the shorthand and the urgency, so you can onboard without anything important slipping through the cracks.

With BELAY support, you can:

1. Get out of the scheduling, inbox and CRM bottleneck without losing visibility
2. Hand off onboarding, paperwork and follow-up end-to-end, not piece by piece
3. Ramp support up during surge seasons and scale back when needed — without W-2 overhead
4. Stay focused on clients, growth and leadership instead of ops firefighting

The result?

Your calendar is managed.

Onboarding moves without you.

Clients feel taken care of.

And you get back to doing the work that actually grows the firm.

If you're tired of being the bottleneck and ready for support that's **built for finance**, we should talk.

GET STARTED WITH BELAY

Let's match you with an Client Services Assistant who protects your time and helps your firm run sharper, faster and more professionally.

BELAY

ELITE SUPPORT FOR FINANCIAL ADVISORS WHO **REFUSE TO BE BURIED IN ADMIN**