

## CONSULTING &amp; WEALTH OPS SERVICES

# Expert hands on BrainyRich

BrainyRich is a wealth management platform you can run yourself. But you do not have to do it alone. We help you adopt and get more from BrainyRich, and we deliver done-for-you wealth outcomes powered by it: aggregation setup, connecting your existing systems, migrations, rebalancing operations, governance, and enablement.

GROUNDED IN THE PRODUCT

RBAC &amp; AUDIT THROUGHOUT

API-READY &amp; EXTENSIBLE



## 01 What we do

Comprehensive services across the BrainyRich wealth lifecycle, every one grounded in a real product capability.

BrainyRich is a wealth management platform that brings net worth, portfolios, planning, and compliance together for investors, advisors, and firms. Engage one service, or combine several into a program.



### TWO TRACKS · NINE SERVICES

#### TRACK 01

### Improve your BrainyRich

Consulting, implementation, migration, security, and training so your team gets the full value of the platform, faster, and with governance from day one.

**Wealth Strategy Consulting & Architecture · Migration & Onboarding from Existing Tooling · Rebalancing & Practice-Operations Enablement · Wealth Intelligence & AI Enablement · Compliance, RBAC & Governance · Training & Team Enablement**

#### TRACK 02

### Powered by BrainyRich

Done-for-you outcomes we deliver using the product (aggregation setup, connections to your existing systems, and managed wealth operations) so you can focus on clients.

**Implementation & Onboarding Setup · Integrations & Data Connectivity · Managed Wealth Operations**

## 02 · TRACK ONE

# Improve your BrainyRich

Consulting, implementation, migration, security, and training so your team gets the full value of the platform, faster, and with governance from day one.

## GROUNDED IN THE PRODUCT

**Six services on your own BrainyRich workspace**

From designing the wealth operation and moving off existing tooling, to rebalancing operations, governed intelligence, compliance, and training your advisors, operations staff, and engineers.

- 2.1 **Wealth Strategy Consulting & Architecture**
- 2.2 **Migration & Onboarding from Existing Tooling**
- 2.3 **Rebalancing & Practice-Operations Enablement**
- 2.4 **Wealth Intelligence & AI Enablement**
- 2.5 **Compliance, RBAC & Governance**
- 2.6 **Training & Team Enablement**



## 02 Improve your BrainyRich: design, move, operate

### 2.1 · CONSULTING

#### Wealth Strategy Consulting & Architecture

We help you design the right wealth operation on BrainyRich (account aggregation, model-portfolio library, planning workflow, and household structure) so a solo advisor or a multi-team firm is modelled correctly from day one.

##### DELIVERABLES

- Discovery of your current portfolio, planning, and reporting tooling
- Account-aggregation and net-worth data model design
- Model-portfolio library and rebalancing-policy design
- Solo-advisor vs. multi-team firm topology recommendations
- Workspace, RBAC, and multi-tenancy design grounded in the platform

### 2.2 · MIGRATION

#### Migration & Onboarding from Existing Tooling

Moving off a tangle of spreadsheets, a separate planning tool, a reporting system that does not talk to your custodian, and a CRM full of household notes? We migrate your households, portfolios, and history into BrainyRich with minimal disruption.

##### DELIVERABLES

- Inventory of current portfolio, planning, reporting, and CRM systems
- Household and portfolio migration with mapping and validation
- Historical performance and transaction import where feasible
- Parallel-run validation and a reversible cutover plan
- Team handover with runbooks for the new wealth model

### 2.3 · PRACTICE OPERATIONS

#### Rebalancing & Practice-Operations Enablement

We turn the book of clients into a smooth operation (detect drift, propose tax-aware trades, review suitability, and report to clients) with the attention queue and workflows configured to how your practice actually works.

##### DELIVERABLES

- Rebalancing-policy and drift-threshold configuration
- Attention-queue and task setup for the advisory book
- Tax-aware trade and harvesting workflow design
- Client-reporting cadence and statement configuration
- Review-meeting and goal-tracking wiring across households

## 02 Improve your BrainyRich: govern it and make it stick

### 2.4 · INTELLIGENCE

#### Wealth Intelligence & AI Enablement

We help you put the platform's data to work (drift detection, concentration risk, tax opportunities, and goal-at-risk signals) as a governed roadmap, so advice moves from reactive to proactive without overstating what exists today.

##### DELIVERABLES

- Analytics setup for AUM, performance, and household health
- Risk- and concentration-signal configuration against real portfolios
- Tax-opportunity and harvesting enablement as it ships
- Goal-at-risk and proactive-alert design for the book
- Honest current-vs-roadmap framing so expectations stay accurate

### 2.5 · GOVERNANCE

#### Compliance, RBAC & Governance

We configure BrainyRich to meet your compliance bar (least-privilege roles across investor, advisor, and compliance, audited actions, and suitability oversight) inherited from the Burdenoff platform rather than re-invented.

##### DELIVERABLES

- Workspace RBAC role design and least-privilege access reviews
- Multi-role identity setup with every action scoped and attributable
- Audit-log review, retention configuration, and evidence workflows
- Suitability-review and supervision policy configuration
- Data-protection and subprocessor alignment for your jurisdiction

### 2.6 · ENABLEMENT

#### Training & Team Enablement

We get your advisors, operations staff, and engineers genuinely productive, not just logged in. Role-based sessions and golden-path playbooks so a new advisor runs the book, and a new developer drives the API, in hours.

##### DELIVERABLES

- Hands-on workshops for advisors, operations, and platform teams
- Golden-path playbooks for onboarding, modeling, and rebalancing
- API, CLI, MCP, and SDK enablement for engineering teams
- Admin and oversight training for compliance and firm operators
- Onboarding checklists and curated learning paths

## 03 · TRACK TWO

# Powered by BrainyRich

Done-for-you outcomes we deliver using the product (aggregation setup, connections to your existing systems, and managed wealth operations) so you can focus on clients.

## UNDER ITS OWN NAME

**Driven from your portal or app through the documented API**

BrainyRich stays under its own name: there is no white-label or rebranded edition. Everything is validated in a sandbox before a single real review goes out.

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**3.1 Implementation & Onboarding Setup**

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**3.2 Integrations & Data Connectivity**

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**3.3 Managed Wealth Operations**

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## 03 Powered by BrainyRich: done-for-you outcomes

### 3.1 · IMPLEMENTATION

#### Implementation & Onboarding Setup

Our engineers stand up your BrainyRich-powered wealth operation end to end (account links, models, planning, and reporting driven through a single, programmable API surface) so you go live with a working advisory workflow, not a half-wired stack.

##### DELIVERABLES

- Account-aggregation and net-worth views connected to your front end through the API
- Model-portfolio and household setup with target allocations
- Goal, projection, and reporting configuration for your practice
- Advisor, household, and workspace onboarding
- Sandbox-validated cutover so the first real review works on day one

### 3.2 · INTEGRATIONS

#### Integrations & Data Connectivity

BrainyRich connects to the rest of your stack (custodians, market-data feeds, billing/accounting, CRM, notifications, and analytics) through built-in connections and its documented API. We configure them with you so wealth data flows instead of being re-keyed; if a connection you need is missing, tell us.

##### DELIVERABLES

- Custodian and account-aggregation feed configuration
- Market-data and pricing feed setup for holdings and performance
- Billing, accounting, and fee-schedule sync setup for advisory revenue
- Webhook and event configuration for downstream systems
- Guidance for connecting your own portals, CRMs, and partner apps through the API

### 3.3 · OPERATIONS

#### Managed Wealth Operations

Prefer to focus on clients? We operate your BrainyRich wealth backend for you: monitoring portfolio drift, keeping data and models current, watching reporting and reconciliation, and acting on what the data shows.

##### DELIVERABLES

- Drift- and portfolio-health monitoring across the book
- Account-data, pricing, and model upkeep
- Reporting, reconciliation, and fee-flow oversight
- Scheduled maintenance, backups, and incident response
- AUM, usage, and analytics reporting back to your team

## 03 Two ways we deliver it

### OPTION ONE · POWERED BY BRAINYRICH

#### We set it up with you: aggregation, models, and reporting

Our engineers work alongside yours to stand up your wealth operation on the BrainyRich platform. Account aggregation, net-worth views, model portfolios, planning, and reporting are driven from your portal or app through our documented API, and BrainyRich stays under its own name; there is no white-label or rebranded edition. Everything is validated in a sandbox before a single real review goes out.

- Account aggregation and net-worth views connected to your front end through the API
- Model-portfolio, planning, and reporting configuration
- Sandbox-validated cutover so the first real review works on day one

### OPTION TWO · POWERED BY BRAINYRICH

#### Or hand us the book: managed wealth operations

When you would rather focus on clients, we run the wealth backend for you. We monitor portfolio drift and book health, keep account data and models current, watch reporting and reconciliation, and act on what the data shows, with AUM, usage, and analytics reporting back to your team.

- Drift- and book-health monitoring across all households
- Account-data, pricing, and model upkeep
- RBAC-scoped, fully audited operations, never shared secrets

## 04 How we engage

FROM INTENT TO IMPACT

A clear path from intent to impact. The same loop whether it is a one-week aggregation stand-up or a multi-quarter firm-wide program: scoped, reviewable, and audited at every step.

### 01

#### Discover

We map your households, portfolios, planning, reporting, and goals, and agree on what "done" looks like before any work starts.

##### ENGAGEMENT MODEL

**Engage one service, or combine several into a program.**

### 02

#### Plan

A scoped, reviewable plan: aggregation and model design, rebalancing policy, integrations, RBAC, and rollout sequence, with checkpoints where it matters.

##### PRICING

**Contact us. We scope the right mix to your households, portfolios, and goals.**

### 03

#### Set up

We wire aggregation, import households, configure models and reporting, and validate everything in a sandbox, shipping in increments you can see.

##### SUPPORT

**From standard support to priority response, with incident response, upgrade guidance, and a named point of contact for enterprise engagements. Tiers are scoped to your plan.**

### 04

#### Operate

We hand over with docs and enablement, or stay on to run the wealth backend: monitored, audited, and reporting from the first day.

## 05 We leave your team able to run it without us

Every engagement ships documentation, golden-path playbooks, and hands-on enablement. Whether you keep us on to operate the wealth backend or take the keys yourself, your advisors, operations staff, and engineers understand the platform, not just the dashboard.

- Role-based workshops for advisors, operations, and engineering teams
- API, CLI, MCP, and SDK enablement so teams extend it themselves
- Onboarding checklists and curated learning paths

### HOW TO START

#### Let's scope what you need

Tell us about your households, portfolios, and goals. We will recommend the right mix of consulting, implementation, operations, and enablement, and a plan to get there.

### TALK TO OUR TEAM

**[brainyrich.com/contact](https://brainyrich.com/contact)**

### EXPLORE THE PRODUCT FIRST

**[brainyrich.com/features](https://brainyrich.com/features)**

## GET STARTED

# Let's scope what you need.

Tell us about your households, portfolios, and goals. We will recommend the right mix of consulting, implementation, operations, and enablement, and a plan to get there.

## TALK TO OUR TEAM

[brainyrich.com/contact](https://brainyrich.com/contact)

## EMAIL

[contact@brainyrich.com](mailto:contact@brainyrich.com)

## PHONE

[+91-7358445777](tel:+91-7358445777)

## SERVICES

[brainyrich.com/services](https://brainyrich.com/services)

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