

CHANGING THE WAY YOU DO BUSINESS



SFAA, LLC
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**Sheri's Financial
Administrative Assistance, LLC**

Hi, my name is **Sheri Dermangian**, owner of SFAA, LLC. With over 26 years' experience, I have seen first hand the struggles that advisors have.

- Processing all their own paperwork while trying to run their business.
- Not enough time to "reach out" to existing clients by sending quarterly reports, cards, gifts, etc.
- Projects are left undone because existing staff is overwhelmed or out of the office.

We are a virtual administrative assistance company that will handle your day-to-day tasks. We provide efficient and quality work so you have time to concentrate on what matters most, growing your business.

SERVICES AVAILABLE:

- **New business processing**
- **Account maintenance**
- **NIGO tracking/resolutions**
- **Client meeting prep**
- **Quarterly performance mailings**
- **Portfolio management maintenance**
- **Oversee conversions going direct with custodian**
- **Mailing of birthday/holiday cards/gifts**
- **Fee billing**
- **CRM setup and maintenance**

Call us today at 941.993.3749 for a free consultation and visit us on the web at www.sfaallc.com for a full list of services provided.

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