

ADD-ON · MIGRATION

Advisor Book Migration

One joining advisor's book, up to 100 client relationships, moved from Wealthbox, Redtail or a spreadsheet into your existing FSC or Sales Cloud records with households established.


PRICE
\$4,500
TIMELINE
3-4 weeks
PACKAGE TYPE
Add-on project
WHAT'S INCLUDED

- 30-minute discovery with the joining advisor
- Field-mapping workbook with picklist reconciliation, signed off before any load
- Match-and-update on Tax ID or email into existing FSC or Sales Cloud records
- Sandbox sample load, then production load with count reconciliation
- Households established
- Post-load reconciliation summary

NOT INCLUDED

- Files and attachments
- Email or calendar history
- Org configuration
- Training
- Books over 100 relationships (org migration add-on)

You provide

- Advisor availability for discovery
- Wealthbox or Redtail export access
- Tax ID or email populated on both sides

Assumptions

- Delivered remotely, in English

Done means: Record counts reconcile with exclusions documented and client spot checks pass, or 5 business days after production load without written notice of a material defect.

COMMON QUESTIONS

How long does an advisor book migration take? Three to four weeks from discovery to production load, timed to the advisor's start date.

What if the book is bigger than 100 relationships? Larger books, or several advisors at once, are the Salesforce org migration add-on, quoted by record volume.

Standard on every package. Delivered by a named senior consultant with a written plan, weekly status, one UAT cycle, documentation of what we built and 30 days of hypercare on delivered scope. Never included: software licenses, custom code unless listed, integrations not named, content beyond the numbers listed, legal or compliance approval, on-site work and travel.



Talk to a senior consultant

vantagepoint.io/packages/advisor-book-migration

Book a free 30-minute CRM assessment: vantagepoint.io/get-started
Full scope, FAQs and the latest price are on the package page.