



CHALICE  
CONNECT

# CHALICE MARKETPLACE

## Start Exploring

Benefits

Discounts

Savings

This is your place to get hundreds of services and products at significant discounts. All designed to help you start, run, grow, protect and monetize your business. Access benefits that offer you thousands of dollars in savings on services from top companies.

# MARKETPLACE

## 50+ Benefit Solutions and Growing...

All solution providers featured in the Chalice Marketplace have executed strict service level agreements, ensuring rapid turn around and timely follow up on all inquiries and requests. A dedicated account manager has been assigned by solution providers for ongoing support.



### Categories



Investments



Insurance



Technology



Marketing



Lifestyle



Back Office



M&A



Payment Processing



Job Board



Prescription Card



CHALICE  
CONNECT

877-4CHALICE (424-2542) | [www.chaliceconnect.com](http://www.chaliceconnect.com)

# MARKETPLACE BENEFITS

Access industry leading benefits and solutions via our digital marketplace. We've aggregated the tools you'll need to run, grow, and protect your business. All products and services have been negotiated to bring you significant savings - ensured to improve your bottom line.

## Available Solutions

### Exclusive & Complimentary

**Oasis, a Paychex Company** - Access to group medical, dental, vision, life, and disability insurance at deeply discounted rates (available to sole proprietors).

**Divvy, a Bill.com Company** - Free all-in-one spend and expense management solution. Divvy will match points and cashback on competing credit cards i.e. Sparks, Amex

**Office Depot** - Up to 55% off all office supplies and hardware via your own purchase account.

**UPS** - Up to 50% discount on ground, air, and international. Can even be used with existing accounts.

**BenefitHub** - Everyday savings on restaurants, hotels, car rentals, entertainment, and more - \$4,900 in average annual savings.

**Rxduced** - Instantly save 80% on prescription medication.

**CPA Site Solutions** - Receive a complimentary website setup (\$6000 value) and 25% off monthly services.

---

### Effective Marketing & Lead Gen

**Marketing 360®** - Receive first month for free and a complimentary digital marketing consultation.

**Advisor Websites** - Free Digital Marketing Assessment, 25% Off Select Subscriptions and Reduced Setup Fees.

**Snappy Kraken** - 20% off monthly license fee, plus exclusive promotions.

**TE+A** - Financial services marketing agency. Save over \$500 on TE+A's 360° Brand + Collateral Review and build your brand strong.

**White Glove** - White Glove makes it easy for advisors to succeed through done-for-you seminars, webinars, workshops, social and podcasts. Receive a free marketing analysis and \$30 discount.

**CPA Site Solutions** - Receive a complimentary website setup (\$6000 value) and 25% off monthly services.

**AdvisorPR** - Turnkey public relations program for advisors. Receive up to 2 extra media placements at no charge when committing to an annual subscription.

**FMT Solutions** - Educational marketing systems for financial advisors. Save 30% on license agreement.

**Reminder Media** - Personally branded magazines for reduced setup fee of \$99.99 (retail \$299.99).

**Anchor Point Market Commentary** - No cost timely, relevant weekly market commentary videos delivered automatically and branded to your firm.

### Lending & Investment

**Live Oak** - 15% savings over the lifetime of the loan. Pre-approval in 48 hours. Lower origination fee.

**Stone Castle** - Insured savings account. A smart way to attract held-away assets and create value for HNW and UHNW clients. Reduced minimum account opening deposit of \$250,000, down from \$1,000,000.

**Plan Confidence** - 401k Advice & Management for Individuals. Exclusive discounts on both "Starter" and "Professional" plans.

**TIFIN Wealth** - Receive a 33% discount to an AI-driven platform empowering personalization at scale.

**Rapid Finance** - Fast and simple business financing ranging from small business loans, merchant cash advance, access to working capital and a line of credit.

**Altigo** - Free alternative investment streamlining software.

**Tactical Fund Advisors** - A modern method of portfolio design. Receive a free consult with the CEO.

---

### Mergers & Acquisitions

**Succession Link** - 30% off subscription to the largest buy, sell, merge marketplace.

**Oyster Consulting** - Oyster Consulting serves a range of wealth management and capital markets clients, from independent and dually-registered RIAs to those contemplating the process.

**InCap Group** - The InCap Group provides superior strategic advice to RIAs at the different inflection points of their life cycle, including M&A advice, divestitures, spinoffs, capital raises, succession plans, recapitalizations, valuations, and other strategic consulting services.

**Nesvold Capital** - Nesvold Capital Partners helps asset and wealth management firms to accelerate growth and/or to structure and finance succession plans.

**Devoe & Company** - Retainer fee is waived when interested in a M&A program. Receive access to end-to-end services to help you sell or merge your business with an experienced team ready to help you negotiate the transaction that fulfills your goals.



# MARKETPLACE MEMBER BENEFITS

## Technology

**Orion** - The platform of choice for all growth-focused advisory firms. \$45 per account vs standard rate of \$75 per account. Exclusive membership rates.

**Redtail** - Top rated CRM for advisors. \$75 per month for up to 15 users. Save 25% off retail price.

**Riskalyze** - 10% off Select and Elite Packages.

**QuickBooks** - 30% off all subscription types. Lifetime discount.

**ChalicePay** - Free with membership. Payment processing system used for retainer-based compensation.

**Trendrating** - 15% off intelligent trend analysis software.

**Vestwell** - Sponsor fee waived for the first three months.

**LifeYield** - 15% off retail pricing.

**Linq** - 15% off all products. One tap on any smart device populates all contact information, social channels, business information and more.

**DealCloser** - Digital signature & document management software. Members receive an extended 30-day free trial plus 50% discount for your first year.

**First Ascent** - Flat fee outsourced portfolio management. Receive a reduced rate: 0.35% of AUM with an annual household cap of \$1,200

**ROL Advisor** - 10% off all plans. Includes access to life-transforming digital tools to facilitate your interactive discovery process and unveil your client's story.

**cleverDome** - Multi-device cyber security only available through membership. 10x faster than VPN.

## Compliance & Back Office

**Oasis PEO** - Access to group medical, dental, vision, life, and disability insurance at deeply discounted rates. No age banding, available to sole proprietors.

**NRS** - Exclusive pricing on services and plans.

**E&O Insurance** - Save up to 15% on your annual policy premium with Starkweather & Shepley.

**WeWork** - 20% off flexible office space around the world. Monthly or on-demand spaces available.

**Outsourced CFO** - 20% off all services through Compass CFO.

**NEXA Insights** - 15% off state of the art client survey, client intelligence platform.

**UPS** - Up to 50% discount on ground, air, and international. Can even be used with existing accounts.

**LegalShield** - Up to 30% exclusive, discounted rates on retail LegalShield and IDShield services.

**SmartRIA** - A comprehensive platform that simplifies compliance for wealth managers. Receive 20% off SmartRIA software and 50% off onboarding services.

**1-800Accountant** - Free tax analysis (\$150 value). Get all your accounting needs covered - taxes, books, payroll, and beyond.

**COO Society** - Membership network that educates RIA owners and their staff about technology, HR, and business administration. Members receive \$1,000 off an annual subscription.

**NEW!**

## Lifestyle Offerings

**WeWork** - 20% off flexible office space around the world. Monthly or on-demand spaces available.

**Rxduced** - Prescription drug card app saving up to 80% on prescription drug needs.

**BenefitHub** - Everyday savings on restaurants, hotels, car rentals, entertainment, and more - \$4,900 in average annual savings.

**Winestyr** - Sommelier-curated wines delivered to your door. Receive \$40 off your first wine club shipment.

**Turo** - Join the largest car sharing marketplace. 35% less than traditional companies and options for drivers under the age of 25.



CHALICE  
CONNECT

877-4CHALICE (424-2542) | [www.chaliceconnect.com](http://www.chaliceconnect.com)