

BEST-IN-CLASS SUPPORT

IMPLEMENTATION, TRAINING, AND ONGOING SUPPORT

Tamarac customer support is the best in the business. Highly trained and professional, our support team won't be satisfied until your problem is solved or your question is answered. All of our customer support teams have strong backgrounds in finance and extensive training on all Tamarac products.

You can get answers to your questions by phone, e-mail, or online at our Support & Training Center. The Tamarac Support & Training Center combines our extensive Help Centers for each product with training from Tamarac University in an easy-to-use interface. Find answers to commonly asked questions, watch videos from our comprehensive library of training videos, search our online knowledge base, and more.

PROVEN IMPLEMENTATION PROCESS

Replacing manual processes with software automation represents a significant process change for any firm, and it offers opportunities for greater portfolio management efficiency by leveraging best practices learned from supporting thousands of advisors.

As a client of Tamarac, you will embark on a proven and streamlined implementation process with the support of a highly experienced team that works with you every step of the way. Our implementation team takes the time to fully understand your portfolio and client management process, guides you through setup, and offers best practices along the way.

TAMARAC UNIVERSITY

When it comes to training, we don't believe it's enough for our clients to simply know how to use our software. We understand the degree of change management that occurs when implementing new technology and we know that with change comes opportunities to follow the best practices of those who have gone before you. Whether it's increasing productivity, creating automated workflows, or designing a complex model, we want the process to be rewarding and meaningful.

Tamarac University occurs bi-monthly and trains your staff in our applications using your own data. At any time, your firm can send new and existing staff to any Tamarac University training. If you prefer to get up to speed on Tamarac products at your own pace, your staff can take advantage of the online training option. With online training, you gain access to all the same content and resources as those attending classroom sessions in person—complete with online quizzes, videos, and interactive activities. These online lessons are a great way for new users to get complete product training or for experienced users to refresh their knowledge of any part of the Advisor Xi system.

ADVISOR SUMMIT

The Advisor Summit is your opportunity to join hundreds of advisors from around the country to learn best practices on the Advisor Xi platform from Tamarac product experts.

This three-day event includes advanced learning sessions specifically tailored for Tamarac users - providing you and your staff with a unique opportunity to gain a deeper understanding of how to leverage our technology and scale your practice more profitably.

