Blue Bulldog Operations
AI Operations & Automation Consulting for Financial Services

I build custom AI-powered operations systems for financial advisory firms, the kind of off-the-shelf software can't do. With 12+ years in financial services operations and hands-on experience across RIAs, broker-dealers, and financial service platforms, I work as a fractional operations manager who actually builds, not just recommends.

What I Do

Operations Audit & Roadmap	Custom AI Workflow Builds	Compliance & Content Tools
4-week deep dive into your firm's workflows. I map your tech stack, identify automation opportunities, and deliver a prioritized build plan with ROI projections.	Whether it's automating client onboarding, keeping your team aligned on where work stands, or eliminating the manual tasks eating up hours every week.	Purpose-built AI tools for financial advisors, including SEC/FINRA compliance checkers with auto-rewrite, client-facing presentation tools, and content generation platforms.

Client Engagement Experience

Client Profile	Industry	Team Size	Key Engagement
Regional RIA Firm	Wealth Management	70+ Staff	Full operations audit; SOPs for 4 departments; Asana workflows; Dropbox/SharePoint org; master login recovery; event marketing systems
Solo RIA Practice	Wealth Management	1-3 Advisors	Redtail CRM workflow builds, client onboarding automation, interactive client presentation tools, built custom for the advisors
Independent RIA Network	Wealth Management	80+ Advisors, Multi-state	SEC/FINRA compliance checker with AI auto-rewrite; white-label social media prospecting and content library for advisor network

How an Engagement Works

01 Phase 1: Assessment & Roadmap (4 weeks)
Interview your team, map your tech stack, identify automation opportunities by department, and deliver a prioritized build plan with ROI projections. Scoped by department for larger firms.

02 Phase 2: Implementation (3-6 months)
Build custom workflows one at a time, starting with the highest-impact systems. Each goes through build, test, team training, monitor, and optimize. You get functioning automation, not a recommendations deck.

Ready to see what your firm could automate?
Book a call | Connect on LinkedIn