

# Savings Breakdown

We integrate with the tools you already use to save you time, and even replace a few to save you money.



## Savings on the cost of creating financial plans

- A T3 study revealed that 40% of the cost of creating a financial plan is attributed to data-gathering.
- Assuming an average of two new plans per month at a cost of \$1,000 per plan.



## Savings on the cost of a RTQ and IPS solution

- Assuming an average monthly cost of \$65 for a risk tolerance digital questionnaire.
- Assuming an average monthly cost of \$35 for a digital investment policy statement with e-signature.



## Savings on the cost of managing your CRM

- Payscale places the average pay for a financial advisor assistant at \$16.52 per hour.
- Assuming an average of four hours per month manually creating/updating client records in your CRM.



## Savings on the cost of a survey tool

- The average monthly subscription across the top 5 available survey services is \$30 per month.
- Assuming a business subscription with unlimited customizable surveys.



## Savings on the cost of an e-signature service

- The average monthly subscription across the top 5 available e-signature services is \$25 per month.
- Assuming a single user business subscription paid monthly.



## Savings on the cost of a document storage service

- A basic subscription in a secure online document storage service costs on average \$10 per month.
- Assuming a business subscription with basic sharing features.

**That's over \$1,000 in monthly savings!**

And above all, PreciseFP lets you tailor your clients' data gathering experience to their unique needs. They will feel heard and grateful that you are asking the right questions. **And that's priceless!**