PreciseFP™

# Fact Finding Process

## 1

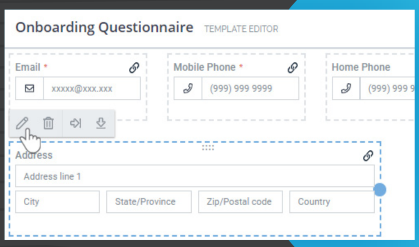
### Import Client Accounts

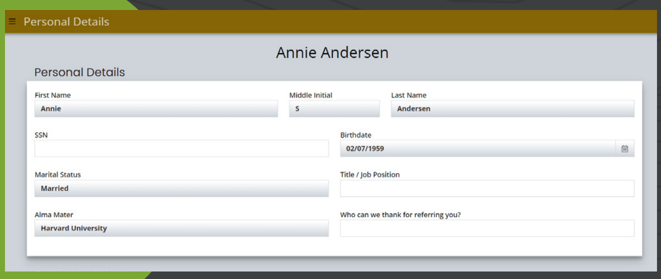
Quickly import 100+ fields from your CRM or financial planning tool, so your client profiles stay current with minimal effort.

## 2

### Optimize Custom Templates

Get started quickly. Choose from over 30+ optimized templates tailored for CRM and financial planning tools. Even customize it to fit your needs.




## 3

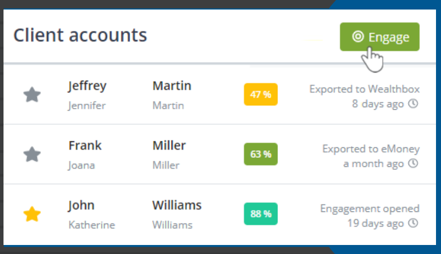
### Engage Clients

Send pre-populated Fact Finders via email. Clients can securely review and update their information in real time from anywhere. They get an enhanced investor experience and you save time.

## 4

### Collect Quality Data

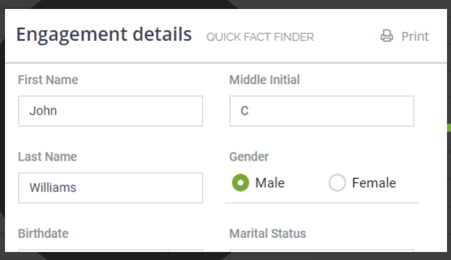
Automatically store and analyze client data. Instantly spot missing information so you can act fast to provide top-notch service.

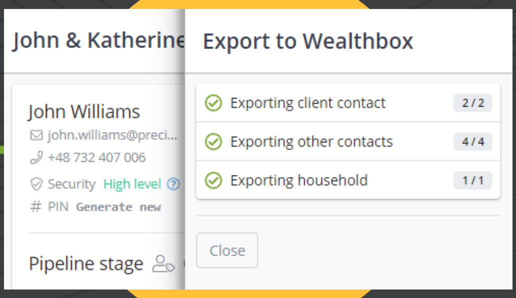



## 5

### Export with One Click

Shave 3-4 hours off each financial plan. Transfer client profiles to your CRM and financial planning tools, so all the information you need is where you need it, instantly.




## Repeat this process every year to keep your clients' financial profiles up to date.

## PreciseFP Comes Complete with:

### Risk Tolerance Questionnaire

Quickly assess your clients' comfort with risk using our easy-to-use questionnaire and tailored Investment Policy Statements.

### Custodial / Broker-Dealer Forms

Access essential forms for account management, including openings and transfers. Upload custom forms as needed and map them for quick, repeat use.

### Paperless Agreements

Streamline document creation with customizable templates for advisory agreements, letters of authorization, and more. E-signature included.

### Lead Generation Tools

Use ready-made templates to attract new leads. Automatically capture and save prospect data.

**Give your clients on-demand service with PreciseFP. Visit PreciseFP.com.**