

CORE FUNCTIONALITIES OF PreciseFP



Virtual Data Gathering & Integration Hub

Fact Finders

Gather and update client information digitally to get back 3-4 hours of work per financial plan.

Prospect Qualification Tools

Work in digestible chunks to gather bite-sized pieces of prospect data to ensure a good fit.

Document Request and Delivery

Easily send and request important documents, and even track when clients download them.



Risk Tolerance & IPS

A scientifically validated risk tolerance questionnaire integrated with our IPS. Use as-is or customize to suit your needs.

Service Agreement Solution

Simplify the creation, distribution, and management of branded, secure service agreements.

PDF Mapper

Map any PDF template and automatically fill it with your client's data. Your client gets the PreciseFP experience and you get a filled, e-signed PDF.

Integration Partners:

