Precise FP

Eliminate Data Entry
with PreciseFP

With PreciseFP, You Can:

Implement pre-built fact finders to onboard clients faster than a phone call.

Handle service agreements, document delivery, disclosures, and e-signatures.

Connect PreciseFP with your existing tech stack to automate data transfer, making your life a whole lot easier.
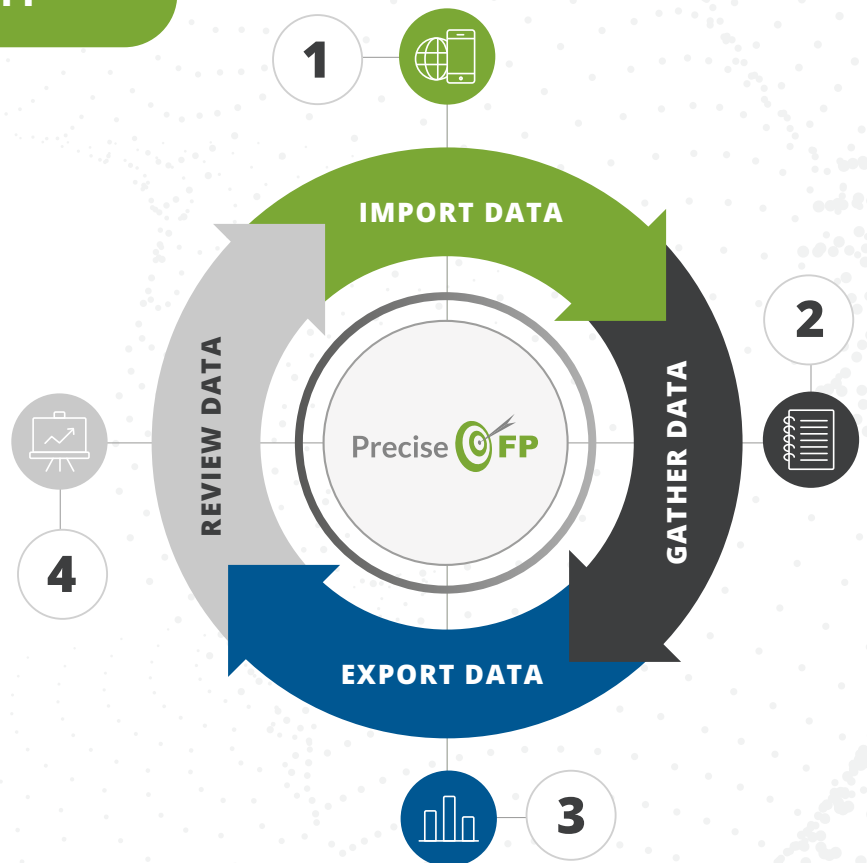
Start immediately to find out why advisors are saything this is **"The best software we've adopted in the last couple of years."**

— Danna N

Client Lifecycle with PreciseFP

Why can't client data from one tool be used in another?

PreciseFP is the data and integration hub you need. Visit PreciseFP.com.

1

IMPORT DATA

2

GATHER DATA

REVIEW DATA

Precise FP

4

EXPORT DATA

3

Isn't it time you did away with manual data manipulation?
Visit PreciseFP.com to learn more.