Hassle-Free Data Gathering

Easily increase your capacity to serve more clients.

PreciseFP™

Capturing client data is as simple as sending an email.

That client data feeds into CRM records and financial planning tools.

Your client's experience is confidence-inspiring, elegant, on-brand, and cybersecure.

Use PreciseFP for:

Fact Finding

The best way to qualify new leads, onboard prospects, and get updated information before client reviews.

Lead Generation

Set it and forget it! Attract new clients, set up appointments automatically, and use automated pipelines to collect extra details without extra effort.

Paperless Agreements

Use our agreement template as a starting point to create your own advisory agreements, letters of authorization, or any other advisory-related document, complete with e-signature.

Custodian / Broker-Dealer Forms

Whether it's account opening/transfer, ACH authorization, or something else, our forms library has everything you need to engage your client efficiently. And if a form isn't already in our library? Upload the PDF and map it to your custom template for easy repeat use down the line.

Features Include:

Fully Integrated

Easily distribute the **risk tolerance questionnaire** and **Investment Policy Statement** with built-in e-signature.

Data Quality Scores

Automatically assess profiles to meet FINRA's **Know Your Client requirements** with ease.

History Tracking

Track **profile changes** made by your team or your clients, so you're always in the know.

Template Library

Choose from multiple **optimized** templates for financial planning, tax management, and client onboarding.

Customizable Pipelines

Set event triggers that **automate your client's journey** through customized workflows.

Integrations

Seamlessly connect 100s of fields with over 30 CRM, **financial planning**, and specialized tools.