

Retail vs Enterprise Editions

Tackle data gathering differently with PreciseFP.

All versions of PreciseFP include:

◆ **Hassle-Free Client Data Gathering**

Make sure your client's data goes where you need it. Data is captured automatically in PreciseFP, then it is exported to CRM and Financial planning tools.

◆ **Integration with Your Existing Tools**

Saving you both time and money is one of our major goals. That's why we partner or integrate with your most frequently used tools and provide features to replace services you seldom use.































◆ **Configurable Workflows**

From the simple, to the not-so-simple, with PreciseFP you have the flexibility to handle any situation. Create your own engagement templates and customize your client's experience as you see fit.

◆ **Time Back for Higher-Value Work**

Users save an average of 3-4 hours on data gathering per financial plan when they use PreciseFP. That's time you can put back to higher-value, impactful work like taking care of clients and growing your business.

Functionality:

Feature	Retail	Enterprise
Configurable workflows that allow you to create and customize your own templates		
Pre-built integrations to over 30 vendors for easy data migration and form populating		
Template Library that houses dozens of common Fact Finders for data gathering		
Access to PreciseFP's award winning support team for coaching sessions and best practices		
Unlimited teams to segregate data and share templates between users		
Unlimited bundles of 100 account profiles for current and prospective clients		
Single sign on (SSO) for seamless security and easy logins for the whole team		
Remote access so any user can work on behalf of another user		
Access to APIs for easy integration with email, compliance, and other 3rd-party solutions		
Central control of the appearance and functionality of all templates and integrations		
Fixed BCC for the ability to record all emails sent from the team		
Ability to search and display all activity of the entire firm		
Optional enablement of an additional 100+ notifications		
Customized terms of service		
Classified field names for XML or Excel output		



Retail

\$25/month for each team
(for firms that want to segment clients by advisor or team)

\$15/month per 100 client profiles
(households or email addresses)

Month-to-month billing
Prices are subject to change annually

Enterprise

Unlimited teams, and account profiles

Price available upon request. Multi-year agreement with lock-in pricing. Monthly invoicing for all.

Are you looking to enhance your firm's scalability, efficiency, and overall ease of operations? Experience the power of PreciseFP.

To learn more, visit precisefp.com.