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Hogan French Financial Services Streamlines Onboarding and Compliance with PreciseFP

Best-in-class data-gathering software
for improved efficiency and ease.

Hogan French Financial Services turned to PreciseFP to help enhance operational efficiency and better position the RIA firm for expansion and growth.



Invest time upfront in properly setting up the system to fit your specific needs. This initial investment will pay off in the long run by simplifying and speeding up future processes.

— Andria Stubbs,
Financial Advisor and Investor Coach



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Company
Hogan French Financial Services

Industry
Financial Advisory

Location
South Jordan, UT

Number of Advisors
3 (expanding to 5-6)

CHALLENGE

Hogan French Financial Services faced significant operational challenges as they prepared for expansion. The firm needed to efficiently onboard new clients and manage compliance documentation without significantly increasing administrative staff.

KEY CHALLENGES INCLUDED:



SCALABILITY

Ensuring the firm could handle a growing number of clients and advisors without a proportional administrative burden.



CLIENT EXPERIENCE

Providing a seamless and convenient experience for clients during the onboarding process.



ADMINISTRATIVE EFFICIENCY

Reducing time and effort the firm spends on client onboarding and compliance documentation.



DATA SECURITY

Addressing client concerns about the security of their personal and financial information collected online.

SOLUTION

Hogan French Financial Services implemented PreciseFP for:



BETTER CLIENT ONBOARDING

Automated client data collection uses secure online forms, which replaces lengthy phone calls and error-prone manual data transcription.



IMPROVED COMPLIANCE DOCUMENTATION

Auto-filling features quickly and accurately process compliance documents.



CUSTOMIZABLE FORMS

Easily modified forms allow the firm to tailor client outreach and data collection to their specific needs, enhancing efficiency and accuracy.

RESULTS

TIME SAVINGS

Onboarding time was reduced from 30 minutes to 10-15 minutes on average.

SCALABILITY

The team was able to handle more clients and advisors without a proportional increase in administrative workload.

CLIENT CONVENIENCE

Clients are now able to complete forms at their convenience, which has improved client engagement and reduced scheduling conflicts.

ENHANCED SECURITY

Clients initially had security concerns about online data collection, but after understanding PreciseFP's robust security measures, they appreciated the flexibility and convenience.

IMPROVED STAFF EFFICIENCY

Staff benefited from the platform's customizability, tailoring forms to their specific needs and significantly boosting efficiency.

WHAT'S NEXT?

PreciseFP has become an indispensable tool for Hogan French Financial Services, addressing scalability and administrative efficiency challenges to create an experience vastly improved for advisors and clients alike.

By automating data collection and compliance documentation, the firm is positioned for growth without increasing administrative burden. As the team expands, PreciseFP will continue to play a key role in their operational strategy, ensuring seamless and efficient client onboarding and compliance management



...that convenience of not having to enter client information again and again and again, when you're doing paperwork for the same client is just fantastic, having all of that integrated just from a servicing standpoint, is fantastic. So that's our primary use of it, and I couldn't think more highly of it. It's just fantastic.

— Andria Stubbs,

Financial Advisor and Investor Coach



**Ready to increase
your team's
operational efficiency?**

Learn more at
precisefp.com