

Precise  FP



Embracing a Hybrid Approach in Financial Advisory

PreciseFP: best-in-class data management and client communication software for the financial services sector

To anyone considering PreciseFP as a solution,
Andy says:

“Jump in with both feet.”



Company
Quo Vadis Financial

Industry
Financial Advisory

Location
Pearl City, HI

Number of Advisors
2

THE CHALLENGE

Quo Vadis Financial owner, Andy Pike, CLU®, CKA®, is an Air Force retiree after serving for 26 years. He's committed to helping clients navigate their financial needs, a more impactful extension that continues his work from the military.

Andy lives and works in Hawaii but also employs another advisor residing in Tennessee. They needed a solution to manage their financial firm remotely while maintaining a high level of service. They sought to automate various processes to improve efficiency and client engagement and searched for software that could streamline data management, improve client communication, and integrate with existing systems.

They found PreciseFP.

THE SOLUTION

Using PreciseFP uniquely as a service form, clients can acknowledge their understanding of disclosures with a simple click of a button that states, "I acknowledge and read." This feature not only simplifies the client experience but also meets compliance criteria effectively. This is all done remotely as 20-30 percent of his clients are not in Hawaii where he resides. Here's how the process works:



AUTOMATED ENGAGEMENT

When a client is moved to "hired" status in HubSpot, PreciseFP automatically generates and sends the necessary forms. This integration eliminates the need for manual sending, allowing the advisors to focus on more strategic tasks.



CUSTOM SERVICE FORMS

The service form in PreciseFP includes the names of the two advisors, ensuring that client inquiries and information flow directly to the corresponding advisor's HubSpot items.



TICKET CREATION

Each engagement generates a ticket that provides the team with clear guidance on next steps, enhancing operational efficiency and communication within the firm.



COMPREHENSIVE CLIENT INFORMATION

The engagement form is designed to capture all relevant information that Cambridge, the firm's broker-dealer, requires. This includes risk tolerance questionnaires built directly into the form, ensuring that the firm has all necessary documentation readily available.

THE SOLUTION

Andy also made use of several key benefits:



SEAMLESS INTEGRATION:

Integration with tools like Zapier and APIs has streamlined a variety of processes at Quo Vadis Financial.

Andy shared, “We’ve been able to integrate PreciseFP with our other systems seamlessly, automating many tasks that used to require manual input. This has been a game changer for our efficiency.”



SECURITY AND DATA MANAGEMENT:

Secure management of client information is of the utmost importance at Quo Vadis Financial. Personally identifiable information (PII) must be kept out of HubSpot and stored securely in PreciseFP.

Andy explained, “Everybody on the team knows PreciseFP is the first place you go to look at stuff... We can keep all the account numbers out of HubSpot.”

This approach adds an extra layer of security to their operations.



CLIENT COMMUNICATION:

Using PreciseFP to send automated reminders and updates to clients enhances the firm’s communication and service quality.

Andy commented, “PreciseFP’s automated notifications for expiring documents and other updates have improved our client service and ensured we’re always on top of important details.”

THE RESULTS

The automatic distribution of forms and the tailored ticketing system have reduced manual workload, allowing the team to respond to client needs more quickly and efficiently. Additionally, by replicating the exact information Cambridge requests, the firm has ensured it can meet compliance demands without additional effort.

PreciseFP's encryption and security measures gave Andy peace of mind, knowing that sensitive client information was well-protected.

FUTURE PLANS

Andy recognizes that there is still untapped potential with PreciseFP. He's considering setting up a meeting with his team and a PreciseFP representative to explore additional features that could enhance their operations even further. He also sees value in connecting with other advisors who use PreciseFP to exchange insights and best practices.

He expressed his enthusiasm, saying:

“We’re excited about the future possibilities with PreciseFP and look forward to implementing more of the platform’s features to enhance our operations even further.”

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

**Learn more at
[PreciseFP.com](https://www.PreciseFP.com)**