



# How Ameriflex Group Eliminates Manual Entry with PreciseFP

The AmeriFlex Group has customized the PreciseFP platform to create a branded experience for each office, allowing them to scale efficiently while maintaining personalized service for their clients.



**Time-Saving Impact:**

**The time saving is...  
probably like 75% of the draw.**

**When we tell our advisors,  
'You could do this without doing  
all of that,' they're like, 'Sign me up!'**



**Natalie White, WMCP®**  
AmeriFlex® Premier Concierge,  
The AmeriFlex Group



Wealth Management Firm  
**The AmeriFlex Group**

Number of Advisors  
**170+**

Number of Clients  
**13,000+**

Location  
**Headquartered in Las Vegas, NV**  
with partner firms across the United States

Main Contact  
**Natalie White, WMCP®**  
AmeriFlex® Premier Concierge, The AmeriFlex Group

# Problems Addressed



## **MANUAL DATA ENTRY & PAPERWORK OVERLOAD:**

Before adopting PreciseFP, the firm relied on paper client engagement forms, which required both clients and advisors to manually fill out multiple documents. This process was time-consuming, prone to human error, and required substantial follow-up.



## **DATA ACCURACY ISSUES:**

With paper forms, there was always the risk of data entry errors — such as incorrectly transcribed phone numbers or social security numbers — which could lead to significant issues down the line.



## **INEFFICIENCY IN CLIENT ONBOARDING:**

Onboarding new clients involved multiple steps and hours of paperwork. This was a bottleneck for both new client intake and the overall workflow for advisors.



## **CLIENT DISENGAGEMENT DURING ONBOARDING:**

Clients found the traditional method of completing paperwork overwhelming and time-consuming, which sometimes led to delays in their onboarding process.

## Solutions Provided by PreciseFP

### STREAMLINED FACT FINDERS:

PreciseFP's customizable fact finders allow the firm to gather all necessary client information efficiently, with the option for clients to complete it at their convenience. This helps to remove the administrative burden from both the client and the advisor.

### INTEGRATED CRM DATA IMPORT/EXPORT:

The integration with Redtail CRM ensures that much of the client's data is pre-populated in the fact finders, reducing the need for clients to input repetitive information like their birthdate or address.

### IMPROVED DATA ACCURACY:

PreciseFP minimizes the risk of human error by providing a digital, easy-to-use platform for data entry. The export of data to eMoney further ensures that the information is clean and ready for planning.

### CLIENT CONVENIENCE:

Clients appreciate the ability to fill out their forms over time, especially those with busy schedules or those who prefer to complete forms at home rather than in an office. It also allows them privacy and time to think about hard decisions like beneficiary designations.

### CUSTOMIZATION & BRANDING FLEXIBILITY:

The firm can customize the fact finders for different offices, ensuring each location maintains its unique identity while leveraging the same efficient tools.



#### Experiences with PreciseFP's Support Team:

Natalie White speaks highly of PreciseFP's support team, praising their speed, kindness, and responsiveness. She found the chat box to be an efficient source of help and encourages advisors to use it whenever they need a hand.

**"I love them. They're so fast to respond, and they're always so great. Everybody's so nice."**

— Natalie White, WMCP®, AmeriFlex® Premier Concierge, The AmeriFlex Group

## Use Cases

### Client Onboarding and Data Gathering

The AmeriFlex Group uses PreciseFP's customizable fact finders to streamline the client intake process. Advisors from different offices can access a standardized fact finder, white-labeled with their office's branding, and easily collect essential client data.

### Data Integration & Export

The firm imports client information from their CRM (Redtail) into PreciseFP, and exports the completed fact finders into their financial planning software, eMoney. These integrations significantly reduce manual data entry and improve the accuracy of client records.



### Simplified Client Experience

The PreciseFP platform allows clients to fill out the fact finders at their own pace, which eliminates the need for lengthy in-person data-entry sessions. This self-service option saves time for both clients and advisors.

### Customization & Scalability

Each office has the ability to customize its own fact finder while using the core structure provided by PreciseFP. This allows the firm to maintain consistency while catering to the individual needs of each office.

# Highlights

from Natalie White, WMCP®, AmeriFlex® Premier Concierge, The AmeriFlex Group

## Improved Client Experience:

**“It's so straightforward. And it's really easy for them. We've had really good responses from clients who are willing to do something digital.”**

## Error Reduction & Data Integrity:

**“If you're just typing and you have a big bundle of paperwork to go through, it's so easy to mistakenly type a 7 as an 8... not having to worry about that has been a huge relief.”**

## Enhanced Advisor Autonomy:

**“Everybody takes care of themselves pretty well. And if they want something different about their fact finder, they go in and change it.”**

## Client Self-Service Convenience:

**“They can sort of hop in and hop out — ‘I have 5 minutes here, I'll do a little bit of work, then come back the next day’ — they don't have to sit here with us for like an hour, trudging through that packet.”**

# Integrations & Business Improvements

## IMPROVED EASE & ACCURACY

Because the Redtail CRM pre-populates client information from PreciseFP's fact finders, the team saves time moving data between systems and the risk of data entry errors is reduced. The data is then exported seamlessly to eMoney, ensuring a streamlined process for financial planning.

## MORE EFFICIENT CLIENT ONBOARDING

The time previously spent on paperwork has been reduced significantly, allowing advisors to focus more on building relationships with clients rather than administrative tasks.

## REDUCED ADMINISTRATIVE BURDEN

The system's automation of repetitive tasks (like importing client data and exporting it to planning software) has reduced the workload for the firm's administrative staff and allowed for a more scalable operation.

## Key Takeaways

- **Time savings** for both clients and advisors
- **Increased data accuracy** through streamlined, error-free digital forms
- **Improved client experience** with self-service, flexible form completion
- **Scalable solution** that allows for office-specific customization while maintaining consistency across the firm
- **Seamless integrations** with Redtail and eMoney for enhanced operational efficiency



**Advice for Prospective  
PreciseFP Clients:**

**It's so easy to use.  
If you're on the fence,  
just try it out.**

**You don't know what  
you're missing until you  
see what you could have.**

— **Natalie White, WMCP®**

AmeriFlex® Premier Concierge, The AmeriFlex Group



By utilizing PreciseFP, The AmeriFlex Group has transformed their client onboarding process, reduced administrative burden, improved data accuracy, and enhanced the overall client experience, all while enabling scalability and customization for multiple offices. The seamless integration with CRM and planning software further contributes to smoother, more efficient operations.

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