



**How a Growing Firm
Reduced Costs and Enhanced
Its Client Experience
with PreciseFP**

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Data-Gathering Impact:

Before PreciseFP, we spent a lot of time copying and pasting client data.

Now, with PreciseFP, we execute it consistently every time, and it's made our operations so much more efficient.

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Sean Heney, Partner
Wealth Management Advisor

Wealth Management Firm
Suncrest Advisors

Number of Advisors
3

Location
**Utah, Arizona,
and Ohio**

Main Contact
Sean Heney, Partner
Wealth Management Advisor

The Challenge

As Suncrest Advisors grew, Sean Heney faced a major bottleneck: Manual data collection was inefficient and had a negative impact on client experience.

Specifically, the firm was struggling with:



DISCONNECTED SYSTEMS

Duplicate entry of client data into multiple systems (e.g., CRM, financial planning tools) consumed valuable time.



CLIENT EXPERIENCE GAPS

Client meetings started from scratch each time, without building on previous conversations.



SCALING OPERATIONS

With difficulty meeting increasing client demands, the team found themselves at a crossroads, debating whether to hire additional staff or adopt a technology solution.

The Solution

Sean's goal was to build a more efficient and scalable system without hiring additional team members.

He turned to PreciseFP as the central data-gathering hub for Suncrest Advisors. Its flexibility, integrations, and ease of use immediately addressed the firm's core pain points.

Right away, PreciseFP allowed the team to:

Collect Data Once:

As data is entered into PreciseFP, it flows into eMoney and Wealthbox, eliminating the firm's repetitive data-entry tasks.

Customize Forms:

With no coding required, Sean's team could quickly design forms, so each client gets a smooth, personalized online experience.

The Implementation



DATA GATHERING

Before adopting PreciseFP, the insurance side of the business entered data manually, copying and pasting from PDFs and databases into various systems. This led to inefficiencies and a higher risk of errors.

The process was simplified by adopting PreciseFP. The team uses a single data-gathering form in PreciseFP that — once filled out — automatically syncs client information into Suncrest's CRM (Wealthbox) and planning software (eMoney). This streamlined approach has eliminated redundancy, letting the team execute processes efficiently and consistently.

"Before PreciseFP, we spent a lot of time copying and pasting client data. Now, with PreciseFP, we execute it consistently every time, and it's made our operations so much more efficient."



SCALING WITHOUT HIRING

Suncrest Advisors wanted to maintain their team size. They successfully avoided hiring additional support staff by investing in tools that set their existing team up to operate with more ease and at a higher capacity, so they could focus more on strategy and planning.

"Well, we were trying to nail down whether or not to hire somebody new. We really thought we needed to hire someone, but then we started thinking about it — how do we train them? ... We were thinking, 'There's got to be a different solution.' And that's when I found PreciseFP ... It was almost a turnkey solution for us. We were looking for new staff to solve the problem, but really, technology helped us increase our capacity without having to hire additional people."

— Sean Heney, Partner | Wealth Management Advisor

The Results



INCREASED EFFICIENCY

Adopting PreciseFP greatly reduced manual data entry and data duplication. Sean's team was able to define and execute an efficient data-gathering system using the tool, which has consistently improved the client onboarding and service process.

"Yeah, we did a lot of duplicate data entry where, on the insurance side of our business, we'd enter information by copying and pasting from a PDF or from a database. We just didn't have a good system. But then PreciseFP allowed us to define what that system should be and execute it consistently, time after time."



EASE OF USE AND CUSTOMIZATION

The Suncrest Advisor team found PreciseFP's ease of use and customization options to be standout features of the platform. Previously, the team needed a developer's help to adjust forms, or they risked errors when advisors modified them manually. PreciseFP's user-friendly platform makes customization easy. Even users without any technical expertise have been able to make form modifications, which has led to a smoother experience and the opportunity to learn new skills along the way.

"PreciseFP made it easy to customize forms, and I didn't need to be a developer to do it. It was so user-friendly."



COMPLIANCE AND DATA SECURITY

PreciseFP has made it easy to keep client data secure and meet regulatory standards, including FINRA's Know Your Client (KYC) regulation.

"I think it's across the board. It makes business easier, makes planning easier, and I think it improves the client experience. Even from a compliance standpoint, having all that data in one spot is huge."



IMPROVED SCALABILITY

Suncrest saved more than \$50,000 annually by empowering its existing team with better technology versus hiring an additional assistant. With the centralized system, the team has been able to handle more clients without overloading staff or sacrificing service quality.

"I'd say it's really helped us increase capacity. We've been growing like crazy, and it's allowed us to grow more efficiently."

Key Features Used

Integrations:

Sync with Wealthbox CRM and eMoney

Customizable Forms:

Easy-to-adjust templates from the Form Library (no need for technical expertise)

Advisor-Friendly Interface:

Advisors can continue conversations while easily filling out forms behind the scenes

Client-Friendly Authentication:

Clients securely authenticate via email or text, without the need for a new login



On-Demand Support:

The chat feature on the bottom right-hand side... and the response time have been awesome.

They're able to just give you the right stuff kind of right away, and it's been really helpful.

Sean Heney, Partner
Wealth Management Advisor



By adopting PreciseFP, Sean Heney and his team at Suncrest Advisors transformed their operations.

They achieved increased efficiency, reduced manual tasks, and enhanced the client experience, all while scaling their business without hiring additional staff.

The firm is well-positioned for continued growth with a solution that works for advisors and clients alike.

Learn more at
PreciseFP.com