Precise FP

COLLECT CLIENT DATA IN MINUTES, NOT MEETINGS.

PreciseFP eliminates PDFs, paper forms and back-and-forth emails.
Firms collect accurate data once, and it stays connected across every tool.
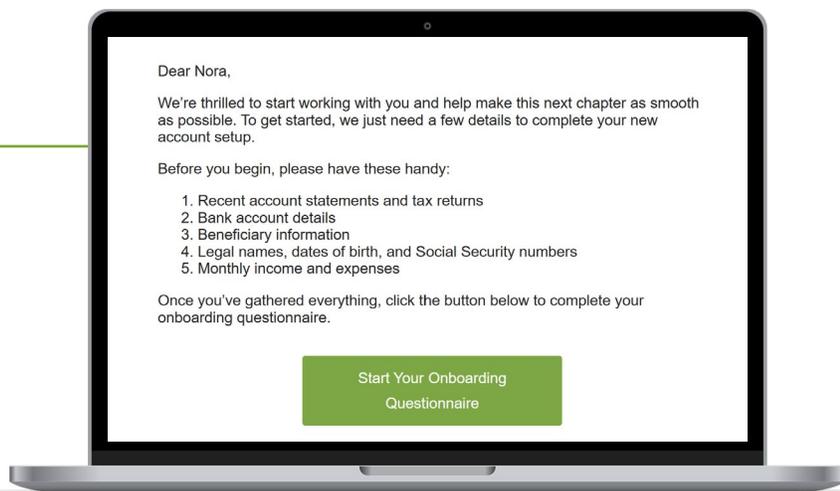
40+ INTEGRATIONS   **100+ MAPPED FIELDS**   **ZERO REKEYING ERRORS**

ONBOARD CLIENTS WITHOUT ROADBLOCKS

Your onboarding process should feel as professional as your advice.

After your first client meeting, set clear expectations:

- Let clients know they'll be getting an email
- In your email, list all the documents and information you need them to provide

Dear Nora,

We're thrilled to start working with you and help make this next chapter as smooth as possible. To get started, we just need a few details to complete your new account setup.

Before you begin, please have these handy:

1. Recent account statements and tax returns
2. Bank account details
3. Beneficiary information
4. Legal names, dates of birth, and Social Security numbers
5. Monthly income and expenses

Once you've gathered everything, click the button below to complete your onboarding questionnaire.

Start Your Onboarding Questionnaire

Advisor Meets Client » Welcome Email Sent » Client Completes Fact Finder » Advisor Reviews & Data Syncs

ADVISOR CONTROLS

Choose Questions   Brand the Experience

Set Required Fields   Client Authenticates via Code

You stay in control of every question, design and detail.

Deliver a modern experience from day one. No PDFs. No paper. No rekeying.

KEEP CLIENT DATA CLEAN AND CONNECTED

1. PREFILLED REVIEW FORM SENT

Clients receive a smart, prefilled Fact Finder to confirm or edit their information.

2. CLIENT UPDATES INSTANTLY SYNCED

Edits flow automatically into PreciseFP, updating records in real time.

3. CLEAN DATA ACROSS EVERY TOOL

Changes update records across CRM, planning and specialized software, keeping your firm connected and client-ready.

Client » PreciseFP » CRM » Planning » Tech Stack

100+ mapped fields bi-directionally synced

Update data once and changes are reflected everywhere

"My clients expect concierge service. PreciseFP makes that possible, it's how we deliver a modern experience."

Lauren Williams, CFP®, CRPC®, MBA, Co-Founder & Financial Advisor, ProsperPlan Wealth

Free Training

Free Support

20+ Years of Experience

DELIVER THE PROFESSIONAL, MODERN EXPERIENCE CLIENTS HAVE COME TO EXPECT.

PreciseFP has even more features waiting for you: service agreement solution, Risk Tolerance Questionnaire, document delivery, Form CRS, disclosures, proof of document download, e-signature, PDF mapping, pipeline and more.

Start your 14-day free trial to explore them all.

Precise FP