



Writing Better Prompts  
for the AI Assistant in PreciseFP



A QUICK GUIDE TO SMARTER ONBOARDING FORM BUILDING

## What Is a Prompt?

A prompt is how you tell PreciseFP's AI Assistant what you want to create. It can be a question, a command or a short description.

Think of it like writing instructions to a really sharp intern. The clearer you are, the better the result. The Assistant will take what you write and instantly turn it into a ready-to-use client form with no templates, no formatting and no setup required.

### Examples of prompts:

*Build an onboarding form with full contact info, financial goals and preferred communication method.*

*Create a values-based intake form for a couple nearing retirement.*

*Generate a questionnaire that assesses investment experience, time horizon and liquidity needs.*

**The Precise FP AI Assistant  
builds the structure.**

**You stay in control.**

# What Makes a Good Prompt?

There are three principles to keep in mind when writing a prompt in PreciseFP.

## WHAT DOES IT MEAN TO BE CLEAR?

Avoid vague language. Be specific about what you want the form to include.

### Less effective

*Make a good intake form.*

### Better

*Create an intake form with contact info, cash flow questions and short-term goals.*

Use plain language, the kind you'd use with your own team. The AI Assistant doesn't need buzzwords or slang, it needs clear instructions. Every word in your prompt should earn its place.

## WHAT DOES IT MEAN TO BE CONCISE?

Clear doesn't mean long. The best prompts are short enough to focus the Assistant, but detailed enough to guide it.

### Less effective

*I need a new client form that works well and captures everything I usually ask people, but make it feel high-end and simple at the same time.*

### Better

*Build a new client form that includes household members, contact info and financial goals.*

## WHAT DOES IT MEAN TO EXPERIMENT?

The best way to improve your results is to try different wording or approaches. You might add formatting cues like:

*"Use a friendly tone."*

*"Include definitions in parentheses."*

*"Organize questions by priority."*

You can also ask the Assistant to help you improve your own prompt writing:

*"Give me five prompt ideas to build a form for military families."*

*"Suggest a prompt that gathers cash flow, tax and debt info."*

The more you explore, the more precise and powerful your results will become.

# What Makes a Bad Prompt?

## COMMON PROMPT ERROR #1: WRITING A PROMPT THAT'S TOO SHORT

Short doesn't always mean concise. Overly short prompts can lead to vague, incomplete forms.

### Poor prompt

*Make a form about risk.*

### Stronger version

*Create a risk tolerance questionnaire that includes investment experience, risk score and liquidity needs.*

The more context you give, the better the AI Assistant can shape the form.

## COMMON PROMPT ERROR #2: TREATING AI LIKE YOU WOULD SEARCH

This is not a search bar. You don't need to ask where to find something. Instead, tell the AI what you want it to build.

### Poor prompt

*Do you have a fact finder for business owners?*

### Stronger version

*Build a fact finder for small business owners that includes revenue, ownership structure and exit plans.*

## COMMON PROMPT ERROR #3: CHOOSING TOO FEW (OR TOO MANY) REFERENCE DETAILS

While PreciseFP's AI Assistant doesn't rely on external documents, your prompt is the reference. Too little guidance = too broad a result. Too much = confusion.

Aim for a balance: enough context to direct the structure, not so much that it

# Good Prompts and Bad Prompts, Compared

## Prompt

*Make a values form.*

*Create a values-based intake form for a married couple nearing retirement. Include goals, top priorities and relationship to money.*

*What forms are good for onboarding?*

*Build a client onboarding form with contact info, tax status and communication preferences.*

## Outcome

*Generates a generic form with unclear intent.*

*Produces a structured, relevant form with meaningful content.*

*Misunderstands the goal. Returns general suggestions.*

*Returns a full, structured template ready to edit and send.*

## USE CASE 1: SUITABILITY QUESTIONNAIRE FOR HNW CLIENTS

### Prompt:

*Imagine you're working with a high-net-worth couple in their 50s. They have complex investments and are concerned about market volatility. Create a suitability questionnaire that includes risk tolerance, liquidity needs, investment experience and expected retirement age. Add simple definitions next to technical terms.*

### Result:

A multi-section form with clearly labeled questions, guiding text and priority ordering. The Assistant adds context to terms like “liquidity” and “investment experience” and presents the data in a way that aligns with compliance expectations.

## USE CASE 2: CLIENT INTAKE FORM FOR MEDICAL PROFESSIONALS

### Prompt:

*Build a new client intake form for a medical professional with high income, student loan debt and limited time. Include sections on cash flow, debt, household size and short-term goals. Use a professional tone but keep the questions short and efficient.*

### Result:

The AI Assistant generates a streamlined, focused form. Sections are clearly labeled, questions are relevant to the segment and the tone matches the client's lifestyle and attention span.

## USE CASE 3: VALUES-BASED PLANNING FOR GEN X CLIENTS

### Prompt:

*Create a values-based planning form for Gen X clients with dependents and competing financial priorities. Include sections on long-term goals, short-term tradeoffs and what matters most in their financial decision-making. Use open-ended questions to guide thoughtful responses.*

### Result:

The AI Assistant generates a form that opens with flexible, reflective prompts — inviting clients to articulate their priorities, concerns and ideal outcomes. Advisors receive deeper insight into what drives financial choices beyond the numbers. The structure is ready to send, with optional space for values alignment, budgeting priorities and future milestones.

# Ready to See What One Prompt Can Do?

Form creation used to be slow, clunky and full of friction.  
Now it's as simple as describing what you need.

This guide is just the beginning. Try a prompt of your own or start with one of the examples. Whether you're onboarding a client, building for a niche or tailoring a suitability form, the AI Assistant is ready when you are.

## Already using PreciseFP?

Log in and go to **My Templates** → **Generate using AI** to get started.

## New here?

Start your free 14-day trial and build your first form in under a minute.

