PreciseFP

AI Enabled

Case Study:

Houston First Financial Group

How a solo advisor with a lean tech stack used PreciseFP to build a branded and efficient client experience.

Houston First Financial Group
Helping You Put Your Family's Financial Future First

Firm Snapshot

Firm

Houston First Financial Group

Leader

Christopher Hensley
President and CEO

"I'm a big fan of PreciseFP."

Team

Solo advisor

Location

Houston, TX

Client Focus

State higher education employees 55+ planning retirement with pension and Social Security coordination plus ORP accounts at Fidelity or TIAA

Core Stack

PreciseFP | Wealthbox | MoneyGuidePro | eMoney
Holistiplan | Calendly | Fireflies | DocuSign | Notion

Podcast

***Money Matters* at moneymatterspodcast.com**

Books

Published: *Digital Kaizen*
In Progress: *Digital Kaizen for Financial Advisors*

The Moment of Truth

When his longtime assistant moved on, the paperwork came back to Chris overnight. Pain points showed right away:

- Paper packets **slowed onboarding and reviews**
- Clients were asked for **the same information more than once**
- **Follow-ups ate up hours** each week
- **Tools did not connect cleanly**

He needed to keep his service personal and professional while running lean. That meant finding a place to capture client data once, get it synced everywhere it needed to go and represent a unified experience of Houston First Financial to clients at every touch.

The Solution: PreciseFP

Chris came to PreciseFP for digital forms and found a whole operating hub, too. PreciseFP became the glue that ties client intake, branded engagements and tool integrations together.

> **"Turned out to be kind of the glue that holds my practice together."**

Capture Once, Use Everywhere

Chris made use of PreciseFP's seamless technology integrations right away.

His prospects schedule meetings with Chris through Calendly. Their contact data syncs into PreciseFP. And from there, each engagement with that individual builds on their prior answers, so even as the relationship grows, they never supply data for the same field twice.

> **"It automatically feeds over from Calendly into PreciseFP as a prospect. It's getting it once and not having to ask for it again."**

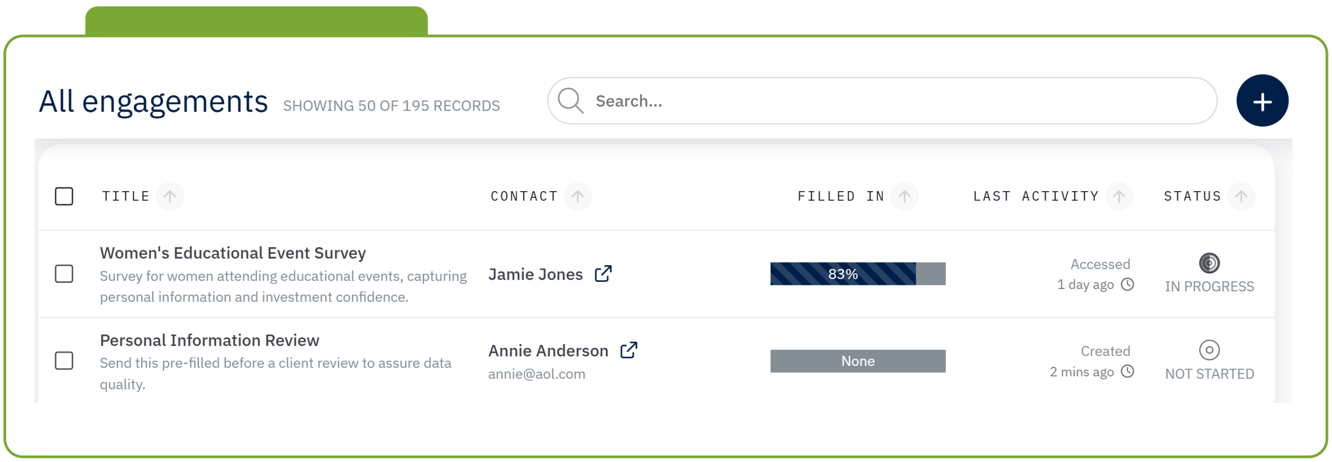
How the Workflow Runs

1. Prospect books a Roadmap Meeting through Calendly
2. Calendly creates a prospect record in PreciseFP
3. PreciseFP engagement collects initial data
4. Future forms prefill with what is already known
5. Clean data flows into Wealthbox, MoneyGuide and Holistiplan
6. Branded reminders keep clients moving
7. Final documents live in eMoney Vault for secure access

Clear Progress for Every Client

Another operational benefit: Chris can see where each engagement stands at a glance.

PreciseFP monitors progress across each page of an engagement, showing both the percentage of data completed and the total time a client spends on it.



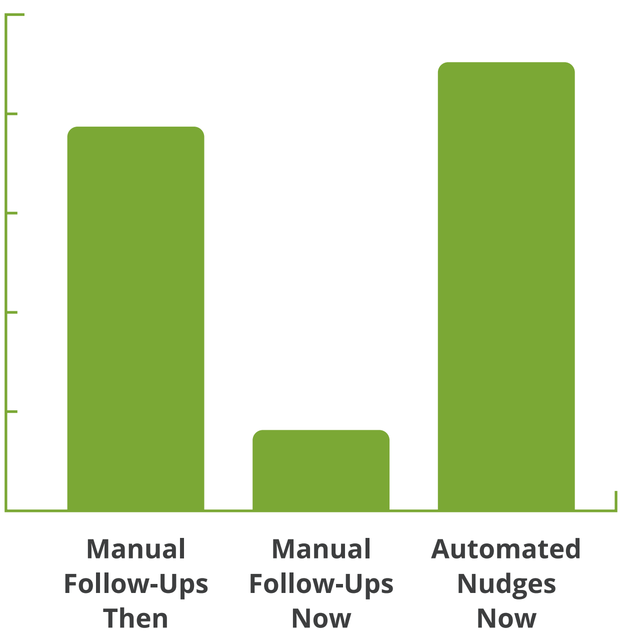
> **“It does it very visually.
> It is one to one hundred percent.”**

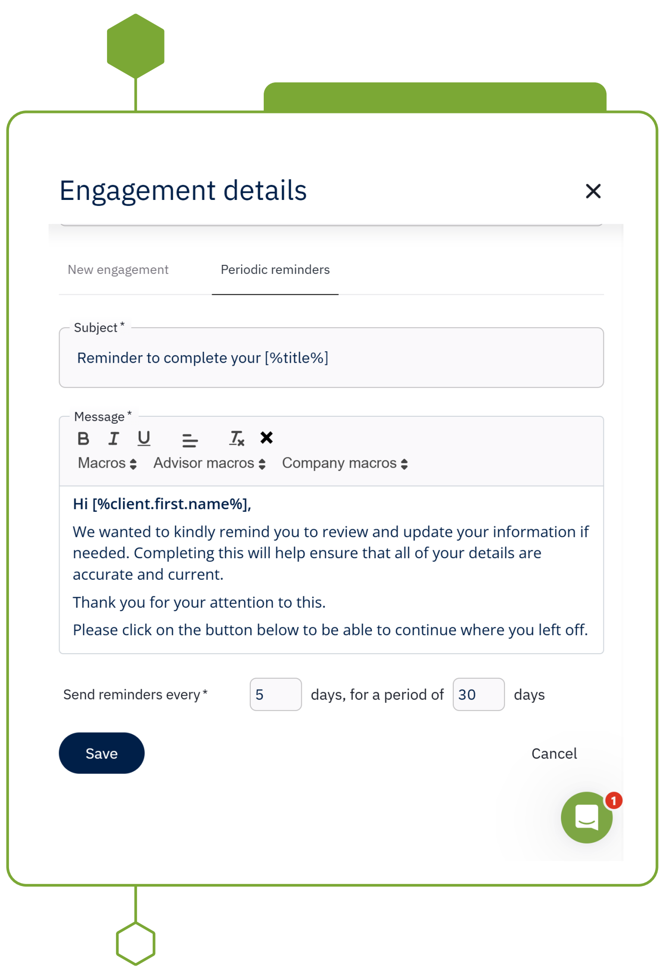
Gentle Follow-Ups on Autopilot

PreciseFP sends reminders by text or email so Chris only jumps in when he's needed.

> "It's not annoying. It's a light ask then a second light ask and it is not me taking the time to do it."

Follow-Up Effort





One Consistent, Client-Facing Brand

A professional, polished image was important to Chris. But it had to be easy to maintain.

With PreciseFP, every form, email and request automatically includes his logo, brand colors and familiar written tone. Clients see Houston First Financial Group, not a patchwork of vendor names.

> **"It's going to have my picture on it, my company logo and the custom colors that match my website. Everything looks the same."**

Holistiplan at Scale

Chris requests tax returns through PreciseFP. Then, PreciseFP routes files to Holistiplan for processing automatically.

> **"I am using it for Holistiplan to request tax reports for people. It looks slick. There is no question that it is secure."**

Security and True Continuity

Everything is scanned and shredded right away. Nothing sensitive sits on a desk.

> "We scan everything, get it digitally into the system and then we are done."

Paper Footprint

Disaster Recovery

If something happens in his local area, Chris can check-in to a safe place, plug in the laptop, log in and keep working. No drying or reconstructing paper files in the case of a flood or fire.

Lean Tech Discipline

Chris tracks the entire tech stack in a Notion spreadsheet. Every quarter, he reviews cost, fit and overlap. He replaces tools when something better can do the job at similar cost.

> "You are probably talking to one of the most frugal people you will ever meet. I track every single piece of tech I am using and what I am paying, then I review it each quarter."

The Client Experience

Older clients adapt well to the PreciseFP experience. In a post-pandemic world, digital is normal. What they notice is a consistent brand front and fewer repeated questions.

> **"Clients do not want to look under the hood. The least friction possible makes it easy for everyone. Even my 55 and up clients are comfortable with it."**

Chris also avoids sending vendor-branded packets. PreciseFP keeps the brand voice steady across all requests.

> **"If you introduce a form with an unfamiliar company logo, it is an extra conversation you do not need."**

Process	Before	After	Result
Client Onboarding	Manual and Paper Based	Fully Digital and Branded	Faster First Meetings and Better First Impression
Follow-ups	Calls and One-Off Emails	Automated Through PreciseFP	Consistent Progress with Less Labor
Data Flow	Re-entry Across Systems	Synced Through PreciseFP	Fewer Errors and No Rework
Paper Files	Rows of Cabinets	All Digital with Scan and Shred	Easier Compliance and Search
Disaster Plan	Physical Restoration	Open Laptop and Continue	Real Continuity with Less Risk
Client Experience	Third-Party Forms and Logos	One Brand Front	Higher Trust and Less Friction

What Chris Would Tell a New User

Start with onboarding and let your process build from there

Brand every touchpoint so each one feels like your firm

Use reminders to replace repetitive follow-ups

Keep ownership of your data so you can pivot when you need

Revisit your tech stack each quarter for fit and value

Looking Ahead

Chris is refining his processes and writing Digital Kaizen for Financial Advisors. He's focused on small steps that compound into a modern, efficient firm that maintains the human touch.

> **"It is about introducing voice-led AI and building your practice one small step at a time."**

Ready to Transform Your Onboarding?

PreciseFP is more than a form tool. It is the system that keeps firms connected, branded and efficient. Advisors like Chris Hensley use it to run lean practices, deliver smoother onboarding and create experiences clients enjoy.

Start your free 14-day trial at PreciseFP.com.

Hear More from Chris

Podcast
Money Matters

Explore Digital Kaizen:
a practical framework for advisors who want fewer tools, better systems and more time back.

Precise FP