RUN YOUR FINANCIAL BUSINESS WITH A CENTRALISED SOFTWARE SUITE

Applied WealthTrack™ is a leading cloud-based CRM for financial advisers and brokers.

Applied WealthTrack is a leading cloud-based CRM for financial advisers and brokers that combines powerful client and policy management features with class-leading sales tracking and reporting.

With Applied WealthTrack, you can set yourself apart from competition with dependable advisory services by actively marketing and prospecting new and potential clients. It helps you stay compliant with custom product-based compliance checklists and allows you to provide your customers with 24/7 access to their portfolios to stay up to date with policy values from all major life offices.

Get rid of the manual customer management processes and take advantage of a centralised client, document and policy management, compliance, and marketing solution to increase sales and drive a more profitable business.

Allows your business to

- Rely on one system
- Build a strong pipeline
- Automate policy updates and compliance
- Simplify sales operations

"Very quickly Applied WealthTrack will show you where the gaps in your sales process are."
– Stephen Gillmor, Director of Financial Services, Campion Insurance

Core Capabilities

Customer Management
Allows you to easily manage Tasks and Activities for yourself and your teams from one location by giving you up-to-date values and benefits for all client policies using data from all major life offices.

Document Management
Automates preparing, signing and management of documents and makes client documents instantly available to advisors and admin staff anywhere, anytime using secure cloud storage. Applied WealthTrack is an end-to-end secure document generation and signing solution integrated with world leader DocuSign.

Customer Engagement
Makes it possible to easily reach out to your customers and prospects via text, email or run mail merge letters, using in-depth client marketing, segmentation, and communication tools. A secure client portal allows your customers and prospects to pre-populate a full Fact Find and Risk Profiler then log in and see their entire portfolio.

Reporting
Gives you and your teams powerful sales tracking and reporting capabilities including automated client and management reports on a monthly or quarterly basis. Fully branded Portfolio Reports can be generated in one click, then encrypted and emailed directly to clients.

Compliance
Provides full compliance tracked for all meetings, calls and advice given to clients. Applied WealthTrack is an Integrated Sanction Checking service with data updated weekly from the EU and UN databases, plus a PEP checking solution from Stubbs Gazette.

Mobile Connectivity
Connects you to client information when out of the office to update prospect information and manage contacts, activities, and sales pipeline anytime, anywhere.

Have Questions?

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