Digital Fact Finds

Capture quality client information from the start.

Digital Fact Finds make it easy to collect client information online, helping you reduce paperwork, improve data quality and walk into meetings better prepared.

What this means for your practice

Save time and reduce administration
Collect information before meetings and reduce follow-up, paperwork and data entry.

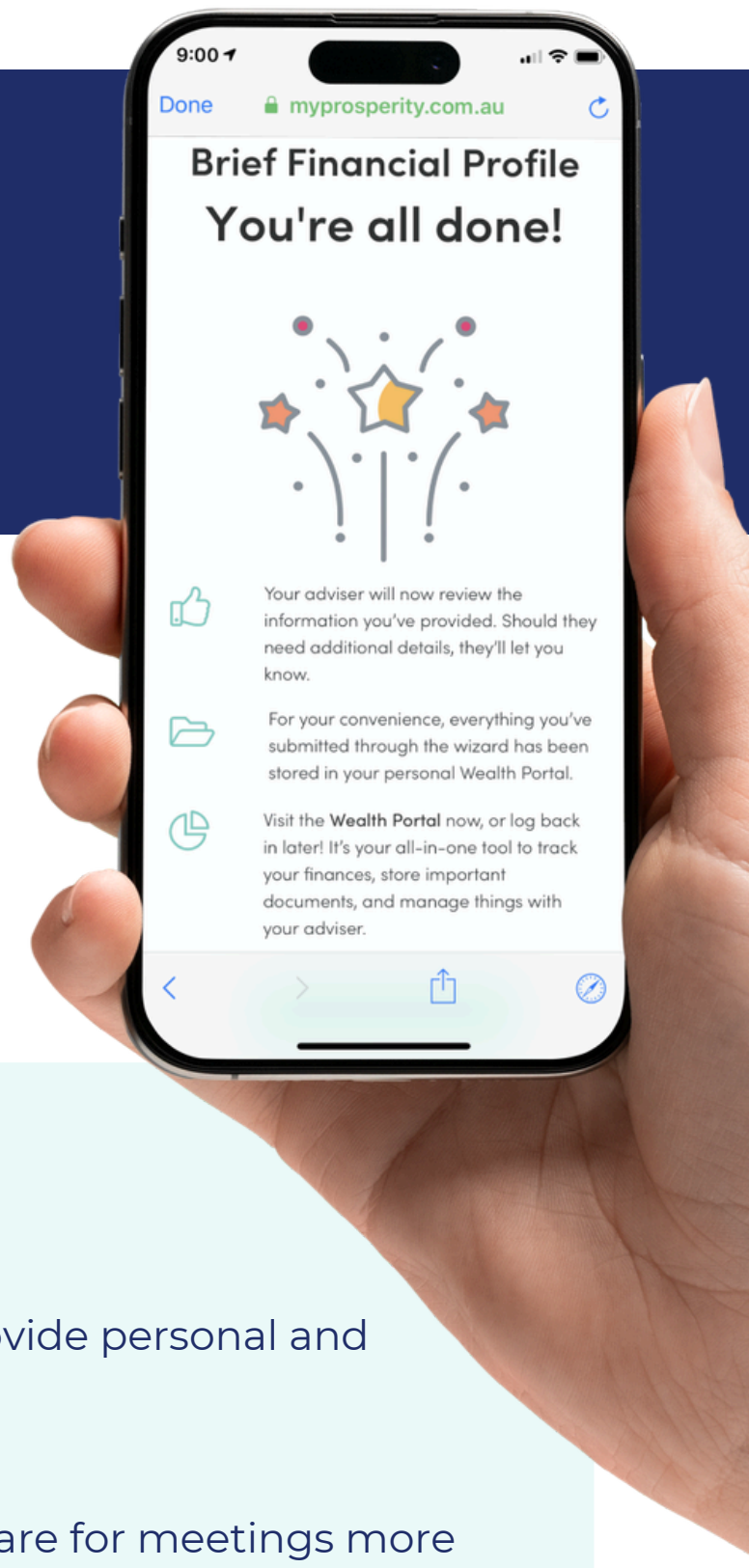
Improve the quality of client information
Capture more complete and consistent information from the start.

Walk into meetings better prepared
Review client information in advance so conversations can focus on advice.

Create a smoother onboarding experience
Make it easier for clients to get started and engage with your practice.

Create a better client experience

- Complete fact finds and questionnaires online
- Provide information securely from any device
- Reduce paperwork and repetitive form filling



Getting started with digital fact finds

Start with a pre-built Digital Fact Find template or work with our implementation team to configure a fact find that suits your advice process, data requirements and client experience goals.

Frequently asked questions

What is a Digital Fact Find?
A secure online questionnaire that allows clients to provide personal and financial information electronically.

Why use Digital Fact Finds?
Reduce administration, improve data quality and prepare for meetings more effectively.

How does it benefit clients?
Clients can provide information securely at a time and place that suits them.

Is client information secure?
Yes. Client information is protected through a secure digital experience using bank-level encryption and industry-recognised ISO-certified security standards.

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