

Enterprise Premier



Enterprise Premier is designed for firms and advisor teams looking to enhance their documentation of client conversations and provide a unified look for their entire team. In addition to what is provided in Enterprise Deluxe, this option provides interactive versions of fpPathfinder financial planning checklists that can be completed via Redtail CRM.

Benefits:

All the benefits of Enterprise Deluxe plus:

- Integration of fpPathfinder checklists into Redtail CRM
- Quickly and easily document client conversations using fpPathfinder checklists
- Standardize quality of advice among the advisors on the team
- Record CRM notes for each checklist item within Redtail CRM
- Audit trails attached to each client record for compliance

Features:

- Interactive financial planning checklists act as a guide and prompt advisors to ask the client the appropriate questions based on the client situation.
- For each question in the checklist, quick references can provide more information or access to fpPathfinder flowcharts for more detailed information.
- Interactive checklists can be initiated within Redtail CRM (or on fpPathfinder.com).
- The completed checklists serve as a note in Redtail CRM, which can easily be referenced in the future or serve as an audit trail for compliance
- Firm-level administrator privileges to manage advisor access (add or remove advisors, set firm-wide branding, and personalize the flowcharts for each advisor, with one consolidated invoice).
- More CRM integrations coming soon!

Pricing (paid by enterprise):

Licenses	2 to 5	6 to 20	21 to 100	101 to 250	251 to 500	500+
Fee (requires yearly commitment)	\$35 /mo/user	\$33 /mo/user	\$31 /mo/user	\$28 /mo/user	\$25 /mo/user	Negotiable