

Planworth to Offer SideDrawer to Enhance Secure Advisor and Client Collaboration

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[SideDrawer](#) Inc. and [Planworth](#) Inc. are partnering to integrate SideDrawer's leading document collaboration technology with Planworth's innovative financial planning platform to enhance secure collaboration between advisors and their clients.

Planworth offers a true virtual family office experience that addresses comprehensive wealth planning up and down the wealth complexity curve and supports the entire planning continuum. Planworth recently launched a client discovery tool and portal that allows advisors to save time by collaborating with clients to create and update wealth plans. With the SideDrawer integration, Planworth will enhance its client discovery tool by allowing for secure document exchange and storage directly in its platform through SideDrawer's API.

"We're very excited to offer Planworth a secure, storage and collaboration solution for their innovative financial planning platform. The handling of sensitive data is increasingly becoming a concern among clients in today's evolving cyber environment, especially in the financial sector. With this integration, Planworth's advisor



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planworth

customers can confidently promote security and safeguarding of client information as another differentiator for their practice.” said Ali Qureshi, Co-Founder of SideDrawer. “Our turn-key SaaS product and our scalable API offering ensures no business has to compromise on safeguarding the exchange of sensitive data,” Qureshi added.

“Planworth’s mission is to help firms and advisors drive the highest value impact for client interactions through tailored planning,” stated Tarsem Basraon, Co-Founder and CEO of Planworth. “We do this by equipping advisors with the tools to understand their clients’ wealth and collaborate with clients to tailor solutions and evolve plans over time. We believe accurate discovery and timely information sharing are critical to the planning experience and SideDrawer will help advisors and their clients manage and share sensitive financial information.”

On the engineering side, Hai Hoang, Planworth’s CTO, said “SideDrawer’s API and documentation have made integrating with Planworth efficient. Their team has been very helpful and supportive through the process which has made things go smoothly. The modern, flexible and secure architecture of our respective platforms promises a robust and durable integration that is easily scalable.”

“Our data and document exchange platform offers multiple deployment options, leveraging our proven user experience, or using our APIs to power the business’ own experience. Both approaches provide turn-key security and a variety of productivity workflows that allow engineering teams to focus their development resources on core product enhancement, while delivering a robust solution to market faster,” said Gaston Siri, Co-Founder & CEO.

SideDrawer will be available to Planworth’s Client Discovery Tool users by Q1 2022.

For inquiries on improving the security profile around collaboration, whether for onboarding, data and document collection, forms, eSignature, or other workflows, please contact us at hello@sidedrawer.com.

About SideDrawer

SideDrawer is an API-based document management platform that improves the client experience around collaboration and organization for businesses of all sizes. The SideDrawer SaaS product is used by advisors, planners, executors and other professionals to securely collect and share sensitive client data and documents. SideDrawer’s infrastructure agnostic APIs are truly scalable, allowing fintechs and enterprises to save significant development resources on non-core, but critical document management workflows. For more information, please visit: www.sidedrawer.com or download the SideDrawer mobile apps on the Apple App Store or Google Play Store, or sign-up at my.sidedrawer.com.

About Planworth

Planworth is a B2B SaaS platform transforming the wealth planning experience and democratizing access to the best financial, tax, and estate planning insights by putting a virtual

family office in the hands of every advisor. Advisors can seamlessly and cost-effectively move up and down the wealth-complexity curve and provide every client (regardless of net worth) with tailored recommendations and planning. To learn more please visit us at www.planworth.co.

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