

Pulse360 Embeds PreciseFP Functionality to Eliminate Time-consuming Copy and Paste for Financial Advisors

RIVERSIDE, CA, UNITED STATES, June 8, 2022 /EINPresswire.com/ -- Pulse360 announced a major new embedded experience with PreciseFP, a Docupace Co. Financial Advisors can now automate the use of PreciseFP's data gathering engagements directly from within Pulse360 - instantly eliminating app-switching and several steps.

“To help financial advisors achieve the flow state, the future is in embedding functionalities of other applications.

Now, with just a few clicks, advisors can generate engagement links and get started on their data gathering engagements directly in Pulse360,” said Anand Sheth, Founder and CEO of Pulse360.

“Every day, advisors and teams, log in to multiple applications to send out a personalized email with links. The new embedded automation with PreciseFP and Pulse360 eliminates all that with a single click.”

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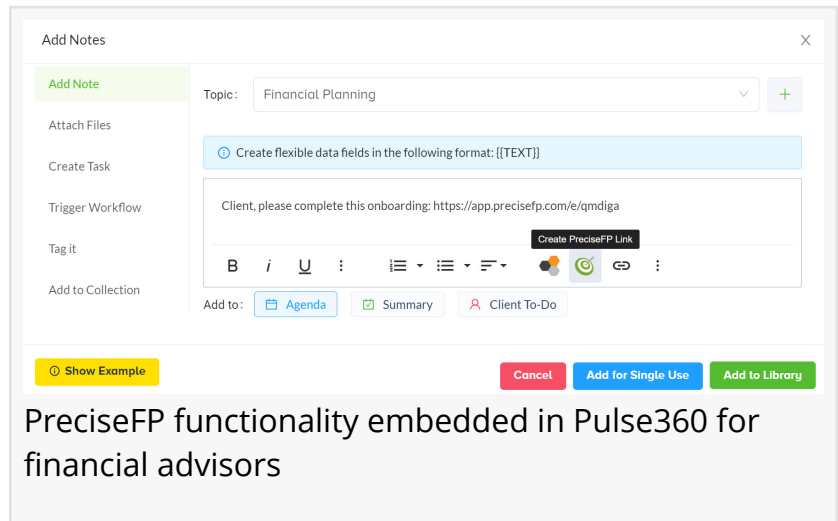
PreciseFP and Pulse360, together, get advisors out of time-consuming tasks like these so that they can focus on what clients value most – their advisor's advice.”

Don Whalen - President of PreciseFP

Advisors can now send out onboarding forms in seconds. Currently, advisors will manually copy and paste engagement links from PreciseFP into their own email – wasting their precious time. Now, financial advisors can click the PreciseFP button and generate engagement links directly within Pulse360 - removing the need to copy and paste. For example, advisors can generate a PreciseFP onboarding link and send a personalized email to a client

or prospective client in seconds. Our automation will connect via API directly to PreciseFP, pull up the relevant contact information, and bring in the engagements seamlessly in Pulse360.

“We're excited and honored to be fully integrated into Pulse360. Both technologies are truly best of breed and using both together just makes sense,” said Don Whalen, President of PreciseFP.



PreciseFP functionality embedded in Pulse360 for financial advisors

“Advisors don’t get paid for mundane tasks like data gathering/entry any more than they do for manually creating tasks, organizing notes, and sending follow-ups for client reviews. PreciseFP and Pulse360, together, get advisors out of time-consuming tasks like these so that they can focus on what clients value most – their advisor’s advice.”

Pulse360’s PreciseFP Automation puts more time back in an Advisor’s week to see more clients. Anand said, “We continue to deeply integrate with the industry’s major technologies. Our goal is to bring automation to advisors with technologies they already use and save financial advisors from doing manual work.”

To learn and ask questions about the new PreciseFP integration, schedule a demo with Anand Sheth by visiting: <https://www.pulse360.com/schedule-press/>

About Pulse360

Pulse360, a 2021 Wealthmanagement.com Industry Awards Finalist and XYPN’s most innovative technology for 2021, was created to make financial advisors at least 50% more productive. Our remote-ready SaaS suite can make every aspect of fiduciary meeting prep and documentation 10X more efficient. The Company was founded in 2019 by Anand Sheth and James Hill. The Company is headquartered in Riverside, CA. Tim Jenkins, a co-founder of SendGrid and former alumni of Techstars, is on the Board of Advisors.

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Hello Dayna,

We look forward to speaking with you on Friday, June 3rd, 2022 at 11:15 AM. Attached is an agenda for our meeting.

Financial Planning

- Client, please complete this onboarding: <https://app.precisefp.com/e/qmdiga>

You will have received a calendar invite which will include details on meeting location and any links if connecting via video conferencing.

Let us know if you would like to add anything to our meeting.

For any questions, please reach out to us.

Regards,

Anand R Sheth

Financial Advisor

123 Main Street, Riverside, CA 92503



PreciseFP link put in to email in Pulse360 for financial advisors

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