

fpPathfinder Paves the Way for Advisors To Provide Advice at Scale

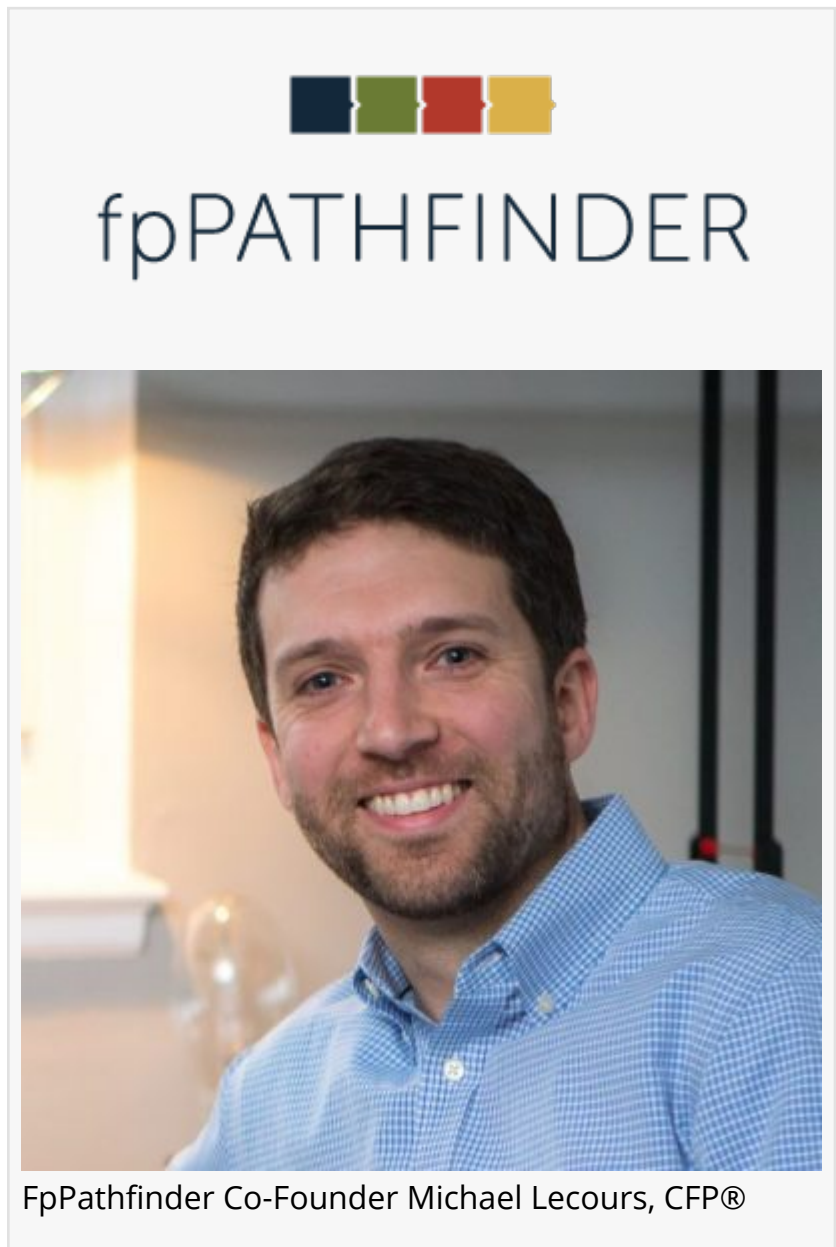
New Public Share Link Feature Addresses Advisors' Request for Tools That Support Efficient, Scalable Client Engagement

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EINPresswire.com/ -- [fpPathfinder](#), an advisor-led fintech company that creates checklists and flowcharts to help advisors have more diligent client conversations, has launched Public Share Link, a new fintech feature that empowers advisors to provide advice at scale.

Public Share Link is the newest iteration of the fpPathfinder's popular Interactive Checklist feature. For the first time, advisors can send one email with a single link to an interactive checklist to many clients. When advisors deploy Public Share Link, they can:

- Systematically gather important client information before the meeting.
- Efficiently identify planning issues when clients complete the Interactive Checklist.
- Intentionally personalize meetings based on the clients needs.
- Masterfully lead meetings that address planning issues the Interactive Checklist identified.
- Easily implement the Client Service Calendar approach to systematically and predictably engage with clients.



FpPathfinder Co-Founder Michael Lecours, CFP®

"It's becoming more important for advisors to be able to provide advice at scale," said fpPathfinder Co-founder Mike Lecours, CFP®. "The Public Share Link feature supports advisors' need to systematize a routine function and dedicate more time to delivering a memorable, high-quality, personalized client experience."

The fpPathfinder team has released a tutorial video that demonstrates how the new feature works. It's open for public viewing and [can be found here](#).

Created by advisors for advisors, fpPathfinder is a fintech company that creates checklists and flowcharts for financial planners to navigate financial planning topics with their clients. In addition to the guides, membership offers white label capabilities, customized dashboards, digital rights, interactive checklists, Share Link, enhanced notes, and CRM integrations with Wealthbox, Redtail, Salesforce Financial Cloud Services, and XLR8.

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