

# In Charge is a contemporary financial snapshot for the next generation

*In Charge is streamlining and modernizing financial services with a revolutionary web app.*

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/EINPresswire.com/ -- In Charge is streamlining and modernizing financial services with a revolutionary web app.

With a focus on improving financial literacy, personalizing service, building trust, and expediting service, it is a game-changer for financial advisors and their clients.

An advertisement for the In Charge app. It features a hand holding a smartphone displaying the app's interface. The background is a light green with abstract shapes. Text on the ad includes "BEINCHARGE.IO", "Be in charge of your money!", and "in Charge" with a logo. The phone screen shows a greeting "Hey, I'm Kyra!" and a message "I'm here to help you get the most out of your FREE consult." with a "Sign Up" button.

BEINCHARGE.IO

**Be in charge of your money!**

**in Charge**

Hey, I'm Kyra!

I'm here to help you get the most out of your FREE consult.

Sign Up

In Charge is a client at The Forge – a business incubator funded by McMaster University, providing hands-on support to founders with novel business ideas in the Hamilton, Greater Toronto, and Niagara Regions to grow their ventures.

Founder, Shalicia Harris, who taught financial literacy, saw the cracks in a dated financial services industry with her own eyes: long appointment times, impersonal service, and pushing debt products to individuals still paying off student loans.

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In Charge leverages technology to gather data and help qualify clients sooner and provide financial literacy and knowledge in a personalized way.”

*Shalicia Harris, Founder of In Charge*

In Charge is here to rebuild the trust between financial advisor and client while expediting and personalizing the process to meet the demands of a fast-paced modern world.

“Every time a person meets with a financial advisor, they meet with them completely blind, and they don't necessarily know what they're going to be talking to you about. In Charge bridges the gap and leverages technology to gather data and help qualify clients sooner and provide financial literacy and knowledge in a personalized way,”

said Harris.

In Charge begins with a financial snapshot where users input details about their finances, themselves, and their financial priorities to set the stage for a time-efficient and personalized appointment with a financial advisor. Finances are divided into the Five Key Pillars of Personal Finances, the main areas that were the pillars of Harris's financial literacy courses including housing, financial resilience from an insurance and a cash perspective, debt, creditworthiness, and investments.

"When clients meet with their financial advisor, the advisor has seen the financial snapshot and they review the components of it together. This is where transparency comes in; it becomes an engaging conversation in which the financial advisor can demonstrate the value they can provide for their clients. Now clients can move forward knowing a little bit more and the financial advisor can dig a little bit deeper on solutions," said Harris.

In Charge brings down the cost of acquisition, in terms of time invested for advisors when it comes to meeting prospective clients for the first time. Advisors are seeing conversions as much as 3x faster thanks to the opportunity to demonstrate value to a customer sooner rather than later.

A conversion tracker is built into In Charge to measure success for financial advisors. The app offers an engaging onboarding process to convert consultations into clients at a high rate. Even when a client isn't retained, the personalized nature of In Charge means that a financial advisor has an intimate understanding of a client's financial needs should they choose to return.

Harris immigrated to Canada, at the time her parents had the money to put a down payment on a home and an excellent credit score. However, Canada doesn't accept credit scores from abroad. It's the kind of detail so few people can glean in the complex reality of finances.

"People don't learn how to manage their personal finances in high school or university, and they don't learn it at the workplace. They tell you to save your money and maintain a good credit score, but nobody teaches the way it should be done; the structures that should be set-up-. And my goal is to make sure that everyone has really easy access to financial literacy, that they don't have to go and search everywhere for it, they can get that in three to five minutes through the platform.

"A lot of people don't have those tools to take action. And that's what In Charge is about," said Harris.

In Charge is named for the result of a survey Harris conducted among friends and strangers alike.

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"The Forge networks of mentors were supportive, provided guidance but challenged you to clearly define your problem, solution, scalability and monetization of the solutions," she said.

Visit In Charge and get your financial journey back on track: <https://beincharge.io>

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