

SideDrawer now available on Cloven CRM's marketplace

TORONTO, ONTARIO, CANADA, October 30, 2023 /EINPresswire.com/ -- [SideDrawer](#), a secure collaboration platform for financial services firms, is now available as an integrated offering in [Cloven](#)'s CRM marketplace. Cloven's CRM is designed especially for financial advisors, built by the same team that developed BluMortgage, used by thousands of mortgage brokers in Canada. Both Cloven and BluMortgage are industry-specific CRMs built by BluRoot Inc and powered by the proven [Zoho](#) platform, which has over 100 million users worldwide.

"The SideDrawer platform provides multiple benefits to advisor practices, from enhancing security, engaging clients and facilitating the collaboration necessary in constructing financial plans, estate plans, and investment

advice," said Massimo Ianniruberto, Founder & Co-CEO of BluRoot Inc. "Creating turn-key solutions with SideDrawer's workflows was extremely simple due to their comprehensive API platform, and we're proud to offer a fulsome solution for advisors," Massimo added.

Through Cloven, users can leverage pre-built workflows that are integrated with key features and functionality within SideDrawer's client-facing digital vault technology. With the click of a button, users are able to create client SideDrawers, invite clients, add family members, collaborators or other third party professionals, send secure Info Requests for enhanced data and file collection, and more.

"We're very excited about making SideDrawer more accessible to advisors through turn-key workflows created by the talented BluRoot team. The integrated experience will streamline



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advisors' workflows by hundreds of hours annually, enhance their practice security, and help advisors meet increasing compliance requirements around client data, privacy and governance," said Ali Qureshi, Co-Founder of SideDrawer.

Existing Cloven users can sign up for an account online and connect their SideDrawer account through the marketplace.

To learn more about Cloven's CRM for Financial Advisors, please visit www.cloven.ca , and to learn more about SideDrawer's collaborative digital vault platform, please visit www.sidedrawer.com.

About BluRoot Inc.

BluRoot is a custom software developer that has built industry specific CRMs over the Zoho platform, which has over 100 million users. BluRoot's two products include BluMortgage, the mortgage industry's leading CRM for used by thousands of brokers, and the newly introduced CRM for financial advisors called Cloven. BluRoot provides a turn-key CRM solution, including its extensive marketplace, and offers customized workflows based on their industry specific knowledge.

About SideDrawer Inc.

SideDrawer is an API-based data and 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, share and store 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 yet critical document management workflows. For more information, please visit: www.sidedrawer.com.

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