

Patrina Launches Singular: A CRM with Compliance Built In for Financial Advisors and Broker-Dealers

NEW YORK, NY, UNITED STATES, October 9, 2025 /EINPresswire.com/ -- Patrina Corporation, a New York-based provider of compliance archiving solutions, announced the launch of [Singular](#), a new CRM platform designed specifically for financial advisors and broker-dealers. Unlike generic CRMs, Singular combines client management features with integrated compliance workflows, helping firms manage growth while staying regulator-ready.



Singular By Patrina

Singular offers a comprehensive suite of tools for financial professionals, including pipeline management, client communications, and analytics, along with compliance essentials such as 17a-4 email archiving, policy and procedure management, complaint tracking, and approval workflows for outside business activities, gifts, expenses, and political contributions.

To support advisors' daily operations, Singular integrates directly with platforms already in use across the industry. This includes Plaid, enabling secure access to custodial and banking data, and BackNine Insurance, providing seamless client insurance data syncing. These integrations give firms a unified view of client activity while simplifying compliance oversight.

"We built Singular because financial professionals deserve a platform that works the way their industry works," said Mark Opila, CEO of Patrina Corporation. "Client management and compliance should not be managed in silos. With Singular, firms can focus on serving their clients while knowing their compliance requirements are addressed in the background."

For more information or to request a demo, visit <https://patrina.com/singular/>

About Patrina Corporation

Patrina Corporation, headquartered in New York, has been helping financial services firms stay

compliant for over three decades. Known for its compliance archiving solutions across trading platforms, unstructured data, email, social media, and text communications, Patrina delivers tools that keep firms regulator-ready while supporting operational efficiency.

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