

Patrina Integrates Singular CRM with BackNine's Quote & Apply® for Unified Insurance & Compliance Workflow

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EINPresswire.com/ -- Patrina, a New York-based provider of compliance archiving solutions, announced today that its financial-services CRM, [Singular](#), now integrates with [BackNine's](#) Quote & Apply® platform. The integration gives advisors a seamless way to access insurance quotes, submit applications, track policies, and maintain full compliance oversight—all without leaving their CRM.



Designed specifically for RIAs and broker-dealers, Singular unifies client management, operational workflows, and compliance requirements in one platform.

With the addition of BackNine, advisors gain a streamlined, end-to-end insurance workflow that connects directly to client records and compliance processes.

A Complete Insurance Workflow Built Into Singular

The integration enables advisors to:

- Generate real-time life insurance quotes
- Submit digital applications directly through Quote & Apply
- Keep insurance data aligned with CRM client profiles
- Maintain full audit trails and compliance documentation
- Centralize insurance, client management, and compliance in one system

This enhancement eliminates manual duplication, reduces operational friction, and gives firms a more complete view of each client's financial and insurance needs.

“Working with advisors every day reminds me that life insurance isn’t just a product—it’s a core

part of responsible planning,” said Adam Levine, Brokerage Director at BackNine. “Yet it’s often the hardest step to streamline. Singular delivers an impressive level of organization, oversight, and client-management strength, and when you add Quote & Apply’s simple digital application experience, firms finally get a truly end-to-end solution.”

“Our integration with BackNine is a true game changer for advisors,” said Mark Opila, Chief Executive Officer at Patrina Corporation. “It gives firms a unified view of each client relationship, instant access to policy quotes, accelerated approvals, and complete compliance oversight. Together, Singular and BackNine provide the tools advisors need to deliver exceptional outcomes at every stage of the client journey.”

About Singular

Developed by Patrina, Singular is an industry-specific [CRM designed for RIAs and broker-dealers](#). It combines robust client management features—pipeline tracking, communications, and analytics—with integrated compliance workflows such as 17a-4 email archiving, policy management, complaint tracking, and approval processes for OBAs, gifts, expenses, and political contributions. Singular also connects to platforms widely used by advisors, including Plaid for custodial data and BackNine for insurance workflows.

About Patrina

Patrina Corporation provides secure, regulator-ready compliance archiving and workflow solutions for financial services firms across the U.S. With over two decades of experience, Patrina serves broker-dealers, RIAs, private equity firms, banks, and insurance companies seeking to modernize their compliance infrastructure.

About BackNine

BackNine offers Quote & Apply®, a digital life insurance solution enabling instant quotes, online applications, and seamless advisor-client workflows. BackNine partners with financial firms nationwide to streamline insurance operations and enhance customer experience.

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