

Quickly find facts on clients with Applied iFactFind

Applied iFactFind is a fully integrated, easy-to-use iPad app customised specifically for the financial advisory industry to enable advisors to carry out a secure and fast fact find on clients.

Whether you are online or offline, the app allows you to download client information to create a new fact find or edit and add to existing client details. All data is held securely and encrypted on the device before being transmitted to a secure cloud server. As soon as you sync to the server, the information is permanently removed from the iPad to ensure your data stays secure. The app also allows you to quickly and safely capture risk responses, signatures and other documents so that you can better serve your clients.

Applied iFactFind provides your business with:

- A risk profiling tool to instantly capture risk responses and display the results.
- The ability to digitally sync written meeting or call notes to the server in seconds.
- Integrated AML document capture to ensure documents are signed and certified with a secure, crisp digital signature.
- The ability to securely store data, signatures, client notes and photos offline until you are ready to sync.

Enables your business to

- Enhance customer service with fast, secure and effortless client data capture
- Save time and costs with digital signature capture and document management
- Securely store client data

Why Applied?

Applied Systems is the leading global provider of cloud-based software that powers the business of insurance.

Recognised as a pioneer in insurance automation and the innovation leader, Applied is the world's largest provider of agency and brokerage management systems, serving customers throughout the United States, Canada, the Republic of Ireland, and the United Kingdom.

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