Applied WealthTrack is a suite of business management products to support financial professionals.

Applied WealthTrack provides a client-centred process that measures lead generation, sales pipeline management, fact finding, client management, productivity and revenue generation.

Applied WealthTrack provides a client-centred process that measures lead generation, sales pipeline management, fact finding, client management, productivity and revenue generation.

Simplified compliance tracking also ensures that regulatory requirements are met, and client relationships can be enhanced by accurate fact finds, effective CRM and document management. Practice management can benefit from comprehensive reporting and time monitoring features for fee justification and invoicing. Transform your business with the increased control and visibility that Applied WealthTrack provides.

Enables your business to

- Enhance client relationships through accurate fact finds, effective CRM and document management.
- Streamline administration processes so focus can be given to clients for lead generation and sales tracking.
- Benefit from comprehensive reporting and time monitoring features for fee justification and invoicing.
- Access simplified compliance tracking to ensure that regulatory requirements are met.

“Very quickly Applied WealthTrack will show you where the gaps in your sales process are.”

Stephen Gillmor, director of Financial Services, Campion Insurance

Core Capabilities

Sales management and targeted marketing.

Manage and track client communication, including complete email and SMS message integration, tasks, activities and time spent working on the client file. Reach more prospective customers through powerful client segmentation and interactive marketing campaigns.

Management reporting and regulatory compliance

Leverage essential MIS for sales polices and commissions reconciliation, as well as maintain a clear record for reporting and audit trails to support regulatory compliance.

Factfind

Take advantage of an integrated risk profiler and fully integrated, easy-to-use and quick to capture fact find manager.

Document management

Instantly access client documents, scan documents, and reference a template letter library through a single repository.

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 broker management systems, serving customers throughout the United States, Canada, the Republic of Ireland, and the United Kingdom.

Call +44 (0) 28 9092 1500
Visit appliedsystems.ie

APPLIED®