Applied iFactFind

Enhance customer service with fast and secure client data capture with Applied iFactFind™.

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

The app allows you to download a client, create a new fact find or edit and add to existing client details, securely store data, signatures, client notes and photos offline until you are ready to sync. Integrated AML document capture allows for signing and certifying with secure, crisp digital signature capture.

What Applied iFactFind Offers Your Business

- 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

Allows 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

Have Questions?

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

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