Advisor CRM

A comprehensive Advisor CRM is at the core of any Wealth Management practice. Ideally the CRM is not only used to track prospects and manage client information in a consolidated manner - but also interfaces smoothly with the account consolidation aspects and external systems.

The Privé Managers Advisor CRM not only allows for a high degree of flexibility - so that the Wealth Manager can themselves tailor their database, but is also fully integrated within the platform. Some of the benefits are:

- Management Information extracts - to get a quick overview of assets held across multiple clients and accounts.
- Consolidated information on a client or prospect, allowing you to maintain Notes and Tasks, store documents securely and link to your email server to ensure relevant email exchanges are captured.
- Easy to customize, so Custom Fields can be used to capture data, and multiple Tags can be assigned to Clients or Accounts - making filtering and searching the database very easy.
- Definable Advanced Search which allows you, on a company level, to select the specific fields to be made available for searching.
- Alerts to let you know when triggers are hit. Those triggers could be client birthdays, negative cash balances, mandate breaches or performance related.

And for those clients who wish to use a dedicated 3rd Party CRM solution, the Privé Managers can offer numerous APIs to other common third party CRM systems.

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