



September 18, 2008

PRESS RELEASE

Spectrum Input, LLC, "shakes up the financial planning community" with PreciseFP™ Online Client Questionnaire for Financial Planners

PreciseFP, a non-proprietary online client questionnaire designed by Spectrum Input, LLC, to improve the client data collection process, is revolutionizing the financial planning industry.

Alpharetta, GA (PRWEB) September 18, 2008 -- It's the simple task that starts off every financial plan -- the collection of essential client data. Yet an informal survey conducted by practice management specialists at Spectrum Input, LLC, <http://www.spectruminput.com/index.html>, suggests that most financial planners still tackle the job with the standard paper questionnaire and No. 2 pencil.

According to Don Whalen, CFP® and co-founder along with Sebastian Skwarek of Spectrum Input, their recently launched non-proprietary online client questionnaire PreciseFP™ is about to change all that.

"The momentum we've gained in the three short weeks since the release of PreciseFP has been phenomenal," says Whalen. "We got an immediate boost from a favorable review by Joel Bruckenstein, columnist with Morningstar Advisor, before we were even officially launched," continued Whalen. "We've barely been able to catch our breath since."

<http://advisor.morningstar.com/articles/article.asp?s=0&docId=15564&pgNo=0>

PreciseFP gathers client data for financial planners using industry-standard communication methods (e.g. XML, PDF) to collect, process, and store the information in the most efficient manner.

Key to its rapid acceptance by the financial planning community is an intuitive client interface that breaks down one misconception that's kept many planners in a pencil to paper mode for collecting client data--- the possible resistance by older clients to using a computer-based tool.

"Simply not true," said Whalen. "Results from a recent survey by AARP suggests that there's less resistance on the part of seniors to getting on the Internet and using it to perform simple tasks than had been imagined. Plus, the PreciseFP interface guides the client to make logical choices at each data entry point," adds Whalen. "Clients feel good about completing the questionnaire and that boosts completion rates for the advisor."

Using a virtual advisor dashboard to customize and manage the online questionnaire and a client portal that can be easily accessed through a link provided by the advisor, PreciseFP is designed to easily integrate with the planner's Web-based or desktop financial planning application.

"We've just completed a successful integration with Money Tree Software(TM) and we're now starting on MoneyGuidePro(TM)," reports Skwarek, Spectrum Input's systems integration specialist, referring to two of the more popular financial planning applications.

"In the meantime, we're rolling out an MS Outlook integration for planners who aren't ready to invest in a full-blown financial planning CRM tool," he continued. "They'll end up with much of the same functionality of a CRM program geared specifically towards financial planners."

PreciseFP users haven't been shy in their enthusiasm for the product that not only improves the quality and quantity of information they gather from clients but also does double-duty as a compliance record keeping tool.

A recent call from New York-based financial planner Cindy Fields, CFP®, of Loyalty Alliance, <http://loyaltyalliance.com/>, put PreciseFP in just the context Whalen and Skwarek are striving for---as a gateway to a professional level of client service.

"She said many of her clients don't have time to fill out a questionnaire," recounts Whalen. "Because PreciseFP allows the advisor to partially complete the questionnaire before even sending it to the client, it demonstrates that clients are important by lifting some of the burden of completing it off their shoulders."

"She said we're shaking up the financial planning industry," beamed Whalen, "and we haven't even completed the first month of our launch."

About: Spectrum Input, LLC, is based in Alpharetta, Georgia, and is dedicated to streamlining business practices for the financial planning and advising professional. Visit <http://www.spectruminput.com/index.html> for complete product information.