finPOWER Connect Features

Client Relationships

When a client contacts you for whatever reason, you need to make sure you have all their information at your finger tips. **finPOWER Connect** has a comprehensive client file that easily and clearly lays out everything you need to know about your client. This includes all their contact details, photos, their relationships including other family members, their Advisors such as their Accountant and Banker, easy access to all their Accounts and security items and all their transactions.

If this isn't enough, a Client Summary Screen can be customised to meet your specific informational requirements.