ADVISOR CRM®

CLIENT RELATIONSHIP MANAGEMENT FOR INVESTMENT ADVISORS

In a socially connected world, it has never been more important for advisors to deliver differentiated client experiences. Advisor CRM helps advisors do just that. With a user experience that is simple and intuitive, actionable intelligence at your fingertips, and an easy connection to people, Advisor CRM makes work personal by enabling your staff to provide a superior level of service.

Advisor CRM is a web-based client relationship management system designed specifically for independent advisors and built on the trusted Microsoft Dynamics® CRM 2016 platform.

Advisor CRM is designed to work with Microsoft Outlook®, and its interface is modeled after familiar Microsoft Office® applications—so your staff will have an easy time adopting it. Because it's built in the cloud, Advisor CRM can be accessed from anywhere via a computer or mobile device.

MEANINGFUL INTEGRATION

Take advantage of the time savings and operational efficiencies that an integrated platform delivers. Advisor CRM seamlessly integrates information and functionality from Advisor View, Advisor Rebalancing, and a growing list of third party applications.

From a client's financial account or household record in Advisor CRM, you can contextually link directly into Advisor View and access performance reporting functionality. For each client, you can access portfolio rebalancing settings and rebalance an account or household in Advisor Rebalancing with one click from Advisor CRM.

Eliminate duplicate data entry. Advisor CRM provides a single place to maintain shared data across multiple systems. Information entered in Advisor CRM is automatically updated in other applications that share the same data. For example, changing a client address in Advisor CRM will automatically update Advisor View—the portfolio management system—with the updated information.

POWERFUL BUSINESS INTELLIGENCE REPORTING

Gain deep insights with unique business intelligence reports. Because Advisor CRM is integrated with a wide range of data sources—including the portfolio management system, the client portal, custodial platforms, and Advisor Rebalancing—it can deliver key analytics without the need for manual intervention. As a result, Advisor CRM offers actionable business intelligence reports that automatically pull data from multiple integrated systems. Use business intelligence reports to track business development progress versus a target, prepare for client meetings, monitor your key centers of influence for referrals, and much more.

As a best practice, firms should track the worth of their business well in advance of succession planning—so that decisions can be made to boost the overall valuation of the business. To aid advisors in this process, we've created the Firm Valuation Profile report. The Firm Valuation Profile report shows you the top 10 metrics for determining the valuation of your business, such as the total number of clients, average client age, and average revenue. Advisor CRM then runs the metrics through extensive analysis to show you how your firm measures up in the areas Tamarac has identified for increasing business valuation.

CONFIGURED FOR YOUR BUSINESS

From business development to onboarding a new client, ongoing relationship and wealth management, and even account closing, Advisor CRM adds automation, transparency, and scalability to your daily operations.

Advisor CRM offers standard pre-packaged workflows that are modeled after the operational best practices Tamarac has learned from working with hundreds of advisory firms as we drive efficiencies through software automation. As part of the implementation process, Tamarac consultants work with your firm to configure workflows, reports, dashboards, and client filters to match how you run your business.

Microsoft GOLD CERTIFIED Partner

Microsoft Dynamics® CRM Partner

Microsoft Partner Network™

2016 PRESIDENT'S CLUB for Microsoft Dynamics

ADVISOR CRM ON THE GO

Mobile applications keep advisors connected to data, team members, and clients. With access to your CRM solution on your Windows® 8 tablet, iPad®, and mobile phone, you have the tools you need to deliver the best service possible.

Advisor CRM helps you stay connected and productive. Use your iPad or mobile device to stay up to date with your client information while you're on the go. Arrive prepared for every meeting, and update your notes, tasks, contacts, accounts, and leads while the details are still fresh in your mind.

SCALABLE

Built on the proven Microsoft Dynamics® platform, Advisor CRM will scale to meet the needs of any RIA. You will have peace of mind knowing that your CRM will support your firm's growth for generations.

SALESFORCE® INTEGRATION

For firms using Salesforce, install the Tamarac app and integrate household, financial account and client information. Tamarac will also send event logs to Salesforce that track actions taken by your clients or advisors in our portal – such as logging in or posting a document. Additionally, use contextual links in Salesforce that direct you to client household and account information in Advisor View for taking quick action on client requests.

AUTOMATED WORKFLOWS

- New Client Onboarding
- Opening a Financial Account
- Closing a Financial Account
- Updating a Beneficiary
- Sending the Annual ADV & Privacy Policy
- Preparing for a Review Meeting
- Completing the Reporting Cycle
- Move Money
- Lead Pipelines
- Birthday Reminders

BUSINESS INTELLIGENCE REPORTS

- Firm Valuation
- All Activities
- Client Profile
- COI Profile
- Revenue vs. Target
- RMD Planning
- Tracking Business Development Leads