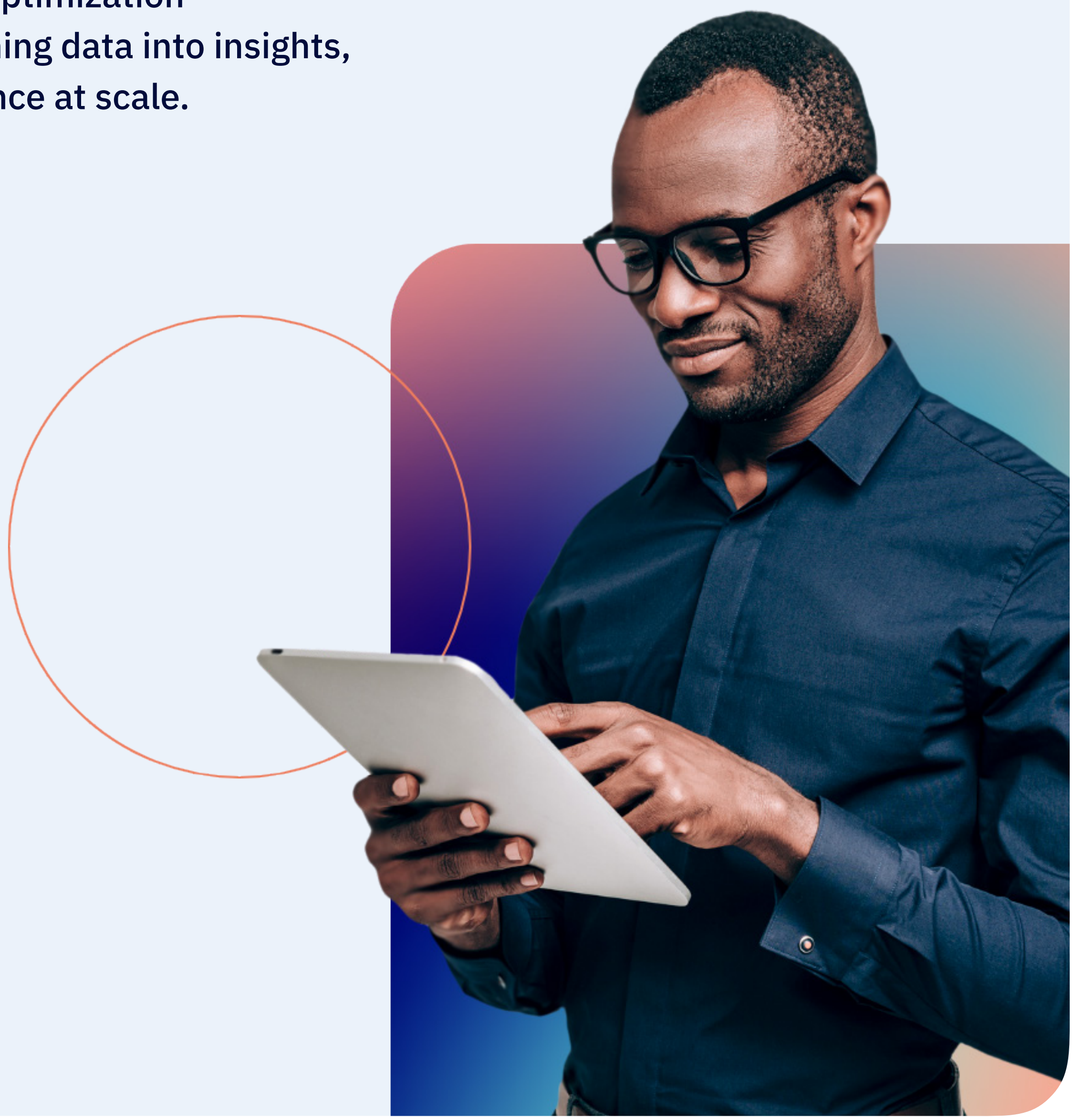
Power more possibilities

The performance optimization platform transforming data into insights, action and excellence at scale.



Technology that's built around you

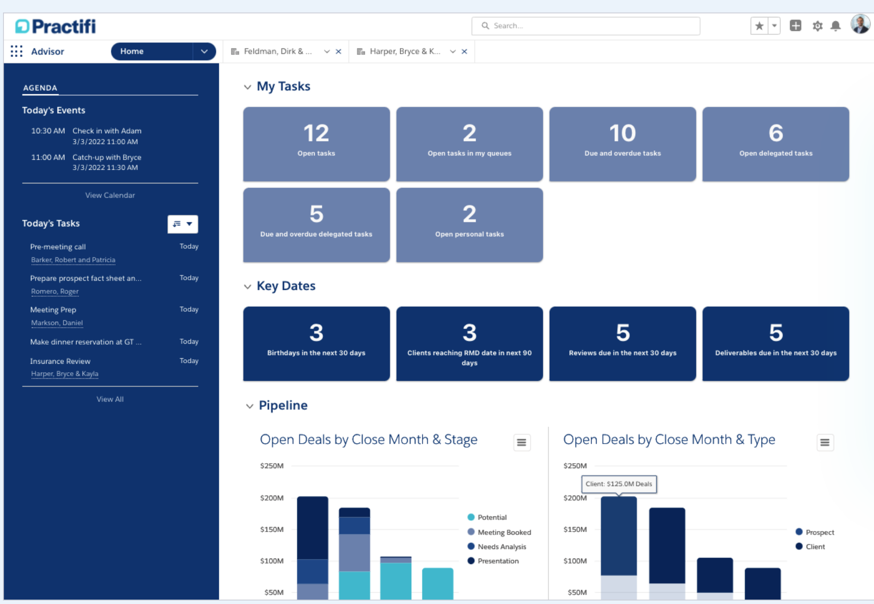
Practifi is an award-winning performance optimization platform powering the nation’s highest-performing wealth management firms.

Powered by Salesforce and built for the industry, Practifi’s product suite is made specifically for the needs of forward-thinking wealth management firms. With deep industry expertise and a strong focus on integrating client feedback, Practifi constantly pushes the boundaries of CRM technology, offering wealth management firms an innovative, powerful and scalable solution.

Purpose-built, future-focused

CRM technology that isn’t designed specifically for wealth management simply won’t work for your business. The time, effort, and expense it takes to modify and maintain an industry-neutral platform can make it a drain, rather than an asset.

Because Practifi is purpose-built for wealth management, you'll have tailored capabilities and exceptional support to shorten time-to-value — allowing teams to increase efficiency, strengthen relationships, and scale more quickly.



See Practifi in action

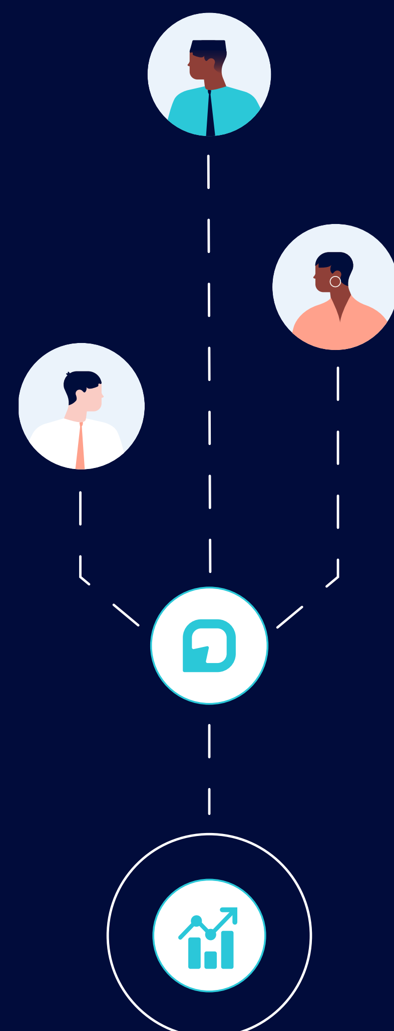
WATCH DEMO

Empower teams to deliver exceptional client experiences.

Practifi brings together all of the tools and information advisory teams need so they're empowered to deliver exceptional client expriences. By unifying data from multiple sources, Practifi provides a complete view across your client book and business so teams can identify client growth and retention opportunities. Powerful workflow automation means everyday processes are easier and more transparent, and by transforming data into actionable insights, teams can provide proactive client service.

Unify data from multiple sources

Experience a complete view of your clients by unifying data across people and systems. With bespoke apps for every team and integrations with industry-leading partners, Practifi provides a single source of truth so teams can have 100% confidence in every decision they make.



Make processes easier and more transparent

Streamline common processes such as account opening transactions and move money requests with powerful workflow automation. Through digitalization, paperwork is eliminated, procedures are tracked, and everyone can see the progress of each task. As a result, clients receive a consistent, repeatable and high level of service.

Drive client growth and retention

Centralize client data in one platform to identify growth opportunities and improve retention. Detailed client overviews surface ages, assets, net worth, risk tolerances, goals and active advisory services in one platform. By unifying client data, advisors can identify new service opportunities and foster loyalty.

Turn data into actionable insights

Turn data into insights your team can use to provide proactive client services. Whether staff need to track upcoming birthdays and RMDs, or management needs to track how many clients were onboarded last month, Practifi helps surface and display data in a way that matters most to their role.

> "We believe that in order to give the client the best experience, it starts with our employees. I truly appreciate the relationship we've built and feel like we're always helping improve the product in all the different ways we're using the tool. One of my most tenured advisors even declared, without provocation, 'I love Practifi!'"
>
> ADVISOR OPERATIONS MANAGER, MORTON WEALTH

Build the ideal tech stack for your firm

A well-crafted tech stack is necessary to unify data, improve efficiency and scale your business. Because every firm delivers a unique client experience, tech stacks often look different for each firm. Whether you use five tools or 15, the most important thing to keep in mind is that you're empowering your team with data and capabilities to delight your clients.

As a core technology provider, we partner with a range of industry-leading tools that help firms unify data, increase efficiency and empower advisory teams. We also provide access to over 3,000 integrations via the Salesforce AppExchange, which significantly expands technology options for our client firms. Whether it's portfolio management, custodians or planning tools; Practifi helps centralize data in one platform, creating the visibility and connectivity your teams need to deliver better client experiences. View more at practifi.com/integrations.

ADDEPAR
ENVESTNET Tamarac
Black Diamond WEALTH PLATFORM
ORION
charles SCHWAB
BNY MELLON | PERSHING
Constant Contact
ENVESTNET MoneyGuide
QUIK!
DocuSign
EGNYTE
Office 365

Strengthen your tech stack with add-ons

As you build your ideal tech stack, it's also important to keep it safe and competitive in a fast-moving industry. Whether it's cybersecurity, marketing, business intelligence, portals or team training; every wealth management firm has unique challenges and needs.

To help with this, Practifi offers a robust suite of add-ons so firms can extend the power of your Practifi platform. Learn more at practifi.com/add-ons.

Your partner in success

New technology is an investment which is why we're committed to ensuring you maximize the value of our technology as soon as possible. This includes various support, training and professional services options to set your firm up for success. Our team are experts in all things Practifi and understand the needs of wealth management firms, so you'll be in good hands.

Because Practifi is purpose-built for RIAs and wealth management firms, it doesn't require expensive third-party consultants to configure. Our implementation professionals will work with you and your team to make tweaks and adjustments to better align Practifi with your unique business structures, desired user setups and security permission needs. We'll make sure Practifi works for you and your team and provide trainings to get everyone up to speed.

> "Building out a specific feature was probably a 4 or 5 month project that's now complete. There's no way we could have done that without a partner like Practifi. The partnership and the ability to customize our platform with the dev team - plus the customer service we're receiving - that's the biggest benefit we get."
>
> CHIEF DIGITAL OFFICER, BLEAKLEY FINANCIAL GROUP

Ongoing Support + Training

We provide a dedicated Client Success Manager for each of our clients. They'll work with you to make sure you get the most out of Practifi. Additionally, clients have access to a comprehensive range of support and training materials.

PractifiU

An on-demand learning platform filled with interactive courses and quizzes to help users learn the basics of Practifi.

Knowledge Base

A collection of helpful articles for setting up and using Practifi, understanding various features and full product release notes.

Support Team

For any additional questions not answered in our knowledge base or PractifiU, users can submit tickets to our support team for a prompt response.

Power more possibilities with Practifi

Built on Salesforce and tailor-made for the industry, Practifi's product suite is made specifically for the needs of forward-thinking wealth management firms. With deep industry expertise and a strong focus on integrating client feedback, Practifi constantly pushes the boundaries of CRM technology, offering wealth management firms an innovative, powerful and scalable solution.

Get started today.

We're ready to partner with you to redefine what's possible. Let's start today.

CONTACT US

VISIT WEBSITE

Practifi