

Innovative CMS and App for Financial Advisers Launches Across the UK

Submitted by: Drumbeat Marketing

Monday, 16 April 2018

Trailblazer Tracking Ltd are changing the way financial advisers and firms engage with their clients through their innovative Trailblazer App launching on April 16th 2018. The app enables on-the-go access to client information, the ability to record outputs from client meetings, telephone conversations can be noted in the contact area, and an auditable messaging service is available all of which will help to comply with the new requirements of MIFID II.

By providing client information or data remotely through the app, this allows financial advisers to build an audit trail demonstrating compliance with the service level agreements in place, thereby protecting client relationships and trail income.

All of the features of the app have been built by practising financial advisers operating successfully in the UK today. The app offers the ability to manage your client contact requirements to suit you and your business. The app can note client communication, CPD and Annual Suitability Assessment Reports (ASAR) quickly and easily in real time. Each license holder will automatically have dual access allowing admin support that will help with the day to day management of the key features within Trailblazer.

Nigel Ruff, of Trailblazer Tracking LTD said;

“Following 25 years of experience advising clients regarding their financial needs and objectives, we recognised the need for instant and easy access to client information and records. In today's society, timely answers and information for clients are vital.

By working with an award-winning IT Company Pipe & Piper Ltd, we are confident that we have developed a product that all busy financial advisers will benefit from working with.”

Trailblazer Tracking LTD provides an auditable reporting programme that evidences clients have received the service that they pay for. It supports us as practitioners to evidence the quality of our client interactions and that can only be good for all parties.

The Trailblazer App is now available on the Apple App Store and the Google Play Store.

FOR FURTHER INFORMATION OR IMAGES, PLEASE CONTACT:

Kelly Tyrrell

Trailblazer Tracking Ltd

customerservices@trailblazertracking.co.uk