



fpPATHFINDER

Ensemble Memberships

We offer three different membership options to help you simplify your firm's financial planning process. Pick the one that is right for your firm!

Ensemble ESSENTIALS

Essentials Features...

- Gain unlimited access to every checklist, flowchart, and summary fpPathfinder publishes
- Leverage fpPathfinder's guides for client service and client development inspiration
- Employ checklists and flowcharts to develop conversation scripts and processes that are replicable
- Achieve peace of mind knowing every advisor has accurate, up-to-date information

Your firm wins when advisors are able to use turn-key guides to become more systematized for both diligence and efficiency.

[Click here for Ensemble Essentials Pricing](#)

Ensemble DELUXE

Essentials Features, plus...

- Apply your firm's logo and color scheme to checklists, flowcharts, and summaries and make them your own
- Make your compliance officer happy when you personalize each guide's back page with required information, disclaimers, and disclosures (as needed)
- Secure digital rights to share your firm's white labeled guides on your website, on social media, or within any marketing campaign or client outreach

Your firm wins when advisors have branded collateral they can use to position themselves as thought leaders to clients, prospects, and centers of influence.

[Click here for Ensemble Deluxe Pricing](#)

Ensemble PREMIER

Deluxe Features, plus...

- Draw clients into the financial planning process using Share Link
- Capture notes directly in the interactive checklists to create accurate, detailed records of conversations
- Leverage the CRM notes integration functionality to clearly identify planning opportunities that are organized into follow-up tasks
- With available integrations, use the single-click option to send notes directly into the CRM. No CRM linked? Just click Copy Text and paste to add the notes to a client record

Your firm wins when advisors can lead with systematized, actionable priorities rooted in client needs to deliver an unparalleled experience.

[Click here for Ensemble Premier Pricing](#)

When every advisor in your firm is an fpPathfinder member, everyone wins.

Reach out to support@fppathfinder.com to start your Ensemble membership