

Access Financial Group, Inc

Founded in 2004, [Access Financial Group](#) is a commission-based retail group. AFG serves mid- to high-net worth individuals as an independent registered representative and works with other registered representatives and registered investment advisors providing private labeled turn-key technology solutions critical to their business. Access Financial Group is Headquartered in Miami, Florida.

Before AppCrown Technology President Mike Simmons spent a number of years working with CRM and other automated and back office systems. During this time he discovered the value of automation for prospecting and on-boarding new clients. "In our business the key to client prospecting is multiple, escalating touch points. You have to continuously maintain a presence in the back of the prospect's mind until the right time arrives. The only way to do this effectively and professionally is to automate that process. But as a start-up, I needed one application that could handle everything but many of the available solutions were incomplete, and I couldn't manage or afford the process of cobbling together multiple applications to develop a comprehensive solution," explained Simmons.

Our Impact to their Process:

When Access Financial Group was introduced to AppCrown by their broker-dealer, [BrokersXpress](#), the firm was using a general CRM system, but looking for a more specialized solution. "AppCrown was the perfect fit. They offer a more comprehensive suite of services and are completely focused on the financial services market. We've been using AppCrown as a CRM and prospecting tool for two years now." Once a prospect becomes a client they are automatically transferred to the next phase within the same platform. "Normally I'd have to switch a new client over to a new system. But AppCrown automates every step of process, making it fool-proof. The history is already saved, so when the client converts from prospect to client, the system retains and automatically transfers all of the information so that it is readily available for moving forward with the new client relationship. No other single system can support this new client transition."

Our Results To the Advisors Bottom Line

Since Access Financial Group began working with AppCrown, new business has picked up by **25% annually and efficiency has doubled**. "The system is so efficient that it structures my time. I can conduct all of my prospecting in 2 hours a day and spend the rest of my time focusing on my clients' business," he explained. "Furthermore, because the system keeps a record of every client interaction, I have a complete record for compliance purposes at my fingertips," he added.

What's Next? AFG has had so much success growing business through technology, that Mike has developed a collection of technology best practices that he is making available to young reps he is bringing into the firm. "**AppCrown is the most important technology I use**, and a solid backbone for any independent brokers looking to grow and better manage their business."