Maximizer Views & User-Defined Fields

Many CRMs, including Maximizer Wealth are designed specifically with the Financial Services Industry in mind. CUSO has customized and fully embraced the ready-to-use Views that create a comprehensive dashboard and panoramic view of the client relationship which fully integrates with the PSA Process. The five tabs in the **Household Record** you will be primarily using include:

- Details
- Activities
- History
- Files
- Notes

A Word About the Details Tab

This DETAILS tab is RICH with valuable client information including:

- All contact information: address, phone, email, website, etc.
- General Information including client classification, lead advisor etc.
- Key Client Information including client since, marital status, etc.
- Joint Children
- Other Family Members
- Client Engagement
- Moments of Truth
- Associated Professionals

Within each individual contact of the house hold you will find the following drop down menus available to house a wide variety of client information:

- Client FORM Profile * the recommended default
- Business Owners
- Checklists
- Client Experience
- Client Goals
- Client Income, Bank and Tax Info
- Client Information – Basic
- Client Information – Specific
- Estate Planning
- Group Insurance Members
- Insurance
- KYC Information

Take a look at each of these so you know what is available to you.