

Communicate without friction or fines.

CurrentClient is a modern phone platform for advisors to deliver an exceptional client experience. The app integrates great with your other systems, is thoughtfully designed and is compliance ready.

\$2.7 billion

in SEC fines for off-channel recording-keeping violations.

But the client experience is more important than ever and “no texting” is not a winning strategy.



Eric Negron
CEO | Forefront



Stand out to clients

CurrentClient is the communication and connection engine for the modern financial advisor.

If you are looking to standout, engage, and deepen client and potential clients trust there is nothing like it in the advisor tech stack.

Seamless CRM sync

Connect seamlessly with your CRM with our industry leading integrations.

Reliable archive feed

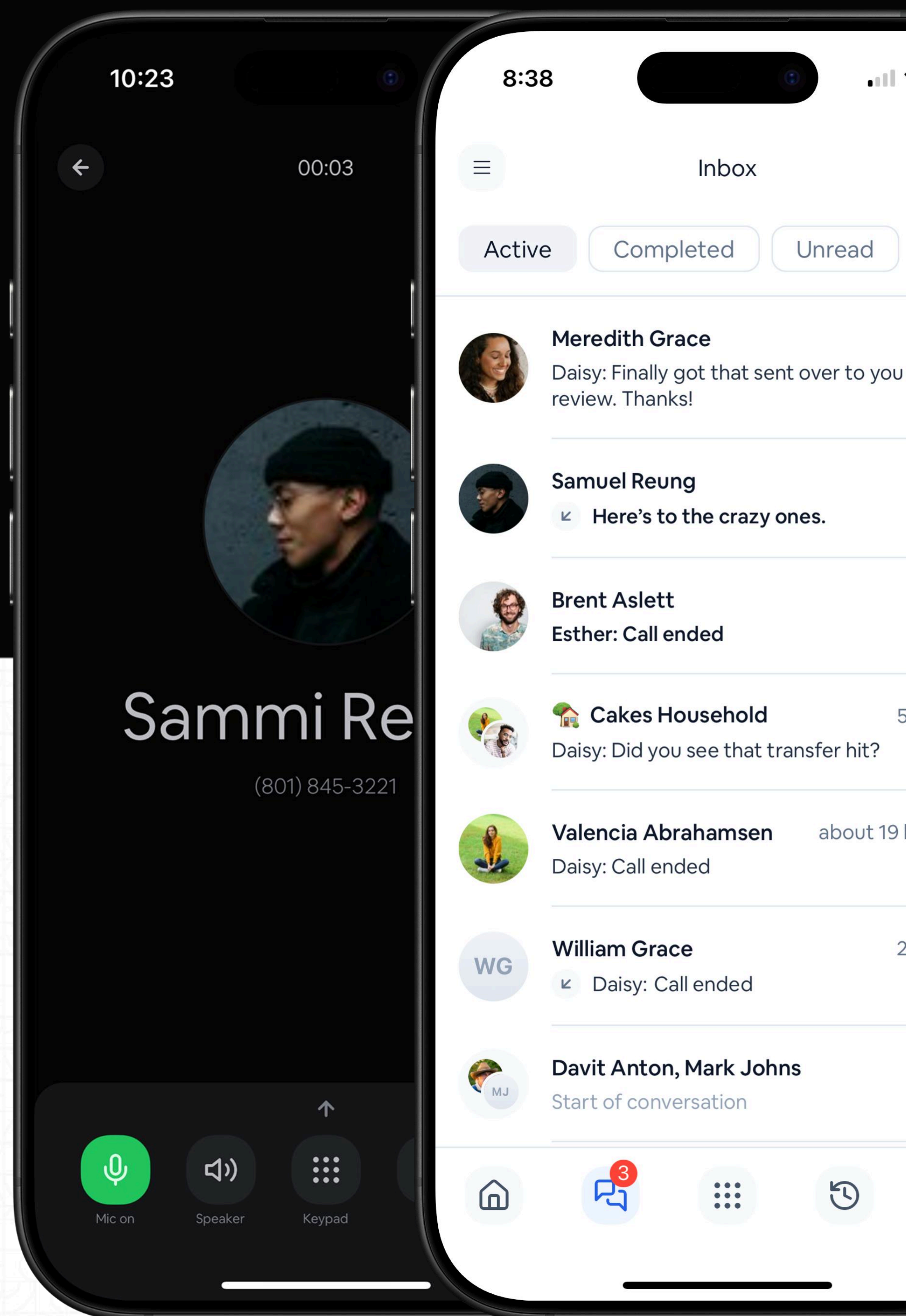
Capture all your written communication and feed it to your archiver for retention and supervision.

Increase compliance adoption

Poorly designed tools create friction with adoption. Give advisors something they will actually want to use.

Organizational governance

Manage advisors' workspaces as an admin to setup and review adoption and proper use.



4.9 star app available on   

[Schedule a demo](#) →