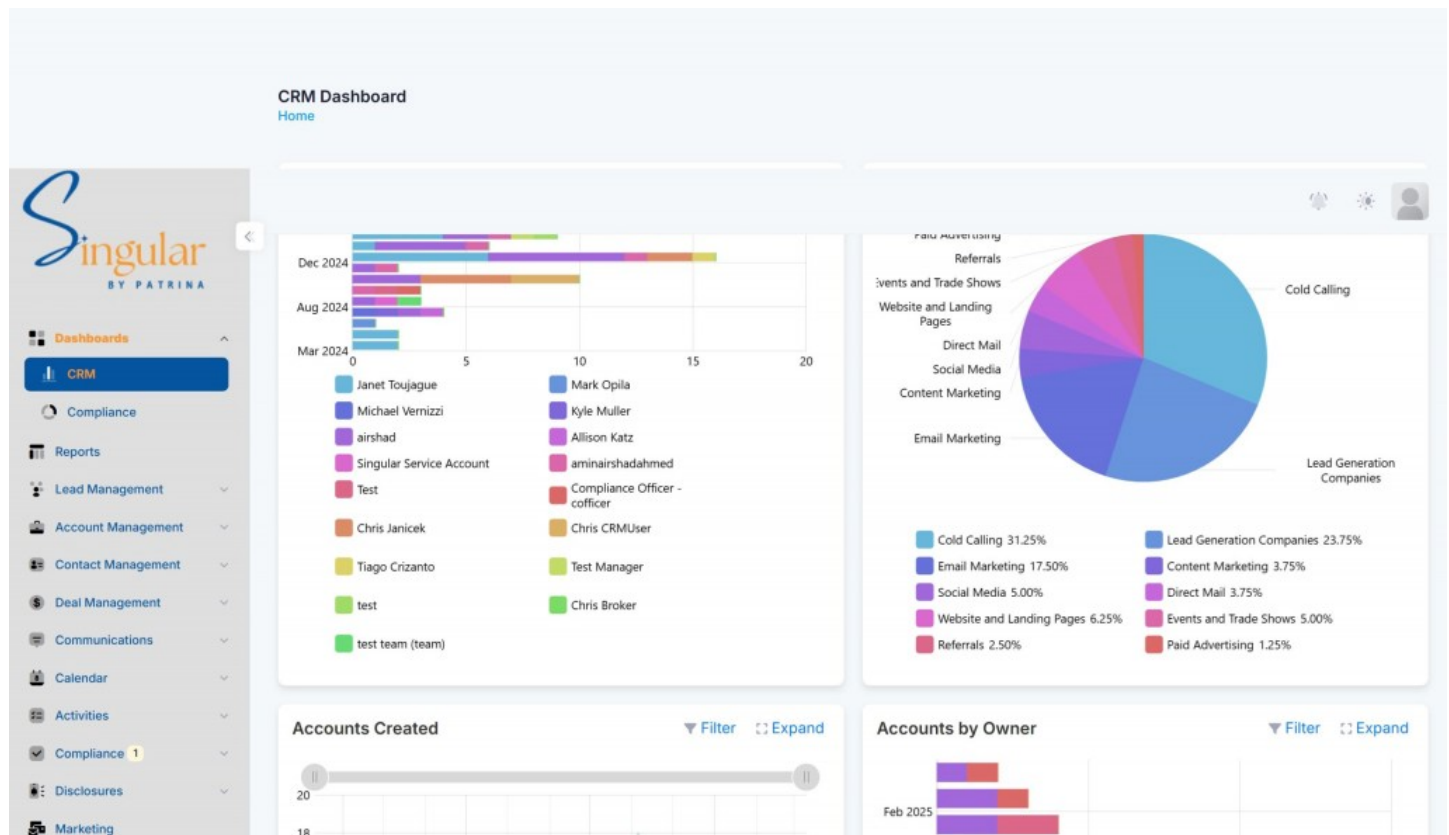


Patrina launches Easy-to-Use CRM for Finance Professionals

New Platform Puts Client Management and Compliance Together in One Simple System



New York City, New York Aug 5, 2025 (Issuewire.com) - Patrina, a technology company focused on financial services, today launched Singular by Patrina, a new [CRM for financial advisors](#) and investment firms. This solution solves a major problem: helping advisors manage their clients while staying compliant with regulations.

Singular changes how financial professionals work by combining client management and compliance tools in one system. Instead of using separate software for client relationships and regulatory requirements, Singular puts everything in one easy-to-use platform.

"Financial professionals have struggled with using different systems for client management and compliance," said Mark Opila, CEO of [Patrina](#). "Singular fixes this problem by putting both functions in one simple platform that works for small firms and large companies alike."

The platform solves a common industry problem where advisors use one system for client data while compliance teams work in completely different software. This creates confusion, wasted time, and potential compliance issues.

Key Features That Make Singular Different:

- **Complete Client Management** stores all customer information, tracks communications, and shows the sales process from first contact to closed deal. The system helps manage deals with

stages designed specifically for financial services.

- **All Communications in One Place** combines email, text messages, and LinkedIn into one platform, so every client conversation is recorded and monitored for compliance.
- **Built-in Compliance Features** include automatic email monitoring, complaint tracking, outside business activity reports, and marketing material management—all connected to client information.
- **Easy-to-Read Reports** provide useful information through simple dashboards that show sales performance and compliance status, helping teams make better decisions.
- **Account Integration** connects with most custodian accounts through Plaid, giving advisors daily updates on client account balances without logging into multiple systems.
- **Policy and Procedure Management** centralizes all compliance documents, policies, and procedures in one secure location with automated workflows for revisions and approvals, keeping the entire team aligned.

Early users report big improvements in how they work and feel more confident about compliance. "Singular has changed our practice by eliminating the need to switch between different systems," said our trusted client. "Our advisors can focus on clients while our compliance team stays updated automatically."

The platform works for firms of all sizes, from small independent advisors to large companies with thousands of clients. The system is easy to learn, so teams can start using it quickly.

Singular helps financial firms deal with complex regulations while growing their business. The automated features reduce mistakes, speed up approval processes, and ensure consistent compliance across all client work.

Availability and Pricing

Singular by Patrina is available now with flexible pricing for firms of all sizes. The platform uses secure cloud hosting, so users can access it from anywhere while meeting financial industry security requirements.

Learn More

Financial professionals who want to improve their operations can request a free demo at patrina.com/singular. The demo shows how Singular makes compliance easier while improving client relationships.

About Patrina

Patrina is a technology company that creates solutions for financial services firms. Through products like Singular, Patrina helps financial professionals grow their businesses while staying compliant with regulations and serving clients better.

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