

	Google Forms	Jotform	PreciseFP
General			
Monthly Cost	\$5/mo. per account	\$19/mo. per account	\$60/mo. + \$30/mo per additional user
Multi-Member Access	Individual Logins	Requires Upgrade	Requires Upgrade
Mobile Application	Yes	Yes	Yes
User Interface	Simple	Robust but intuitive	Complex
Template Library	Limited	Robust for all industries	Robust for financial planning
Security			
Admin Access Controls	Yes	Yes	Yes
Encryption	256 Bit Encryption End to End	256 Bit Encryption End to End	256 Bit Encryption End to End
2FA	Email and Text	None	Text Only
Reporting & Tracking			
Pipeline Tracking	Limited - through Google Sheets	Moderate - through Jotform Tables	Robust
Reporting Capabilities	No	Robust	Limited
Searching & Filtering	No	Robust	No
Database Integration	No	Internal, Hubspot, Salesforce	Internal, Wealthbox, Redtail
Forms			
Conditional Logic	Limited - Hide pages only	Robust - Multi-level conditions to show/hide fields, calculate	Moderate - Single-level conditions to show/hide, calculate
Auto-PDF Generation	No	Yes	No
Autoresponder Emails	Team Only	Team and Client-Facing	Team and Client-Facing
E-Signature	No	Built-In	Built-In
Fillable PDF Mapping	No	Yes	Yes
Pre-Fill From Database	No	Yes	Yes
Prefill From URL	Yes	Yes	Yes
Integrations			

Data Gathering Comparison

Email Marketing Integration	Through Zapier	Mailchimp, MailerLite, Hubspot	Through Zapier
Zapier Integration	Limited	Robust	Moderate
Other Integrations	No	Moderate	Robust for financial planning
G2 Rating			
Overall	4.6/5	4.7/5	Not enough data
Ease of Setup	9.2/10	9.2/10	Not enough data
Ease of Use	9.2/10	9.3/10	Not enough data
Quality of Support	8.6/10	8.6/10	Not enough data
Summary			
Best For Firm Size	Small	Any	Any
Best Features	Easy to use Low cost / free with Google Workspace subscription	Automatic PDF confirmation output Ability to create custom fillable PDFs	Integration with industry-specific tools such as eMoney Form template library
Worst Drawbacks	Lack of robust conditional logic and database features	No direct integration with industry-specific tools	User interface is clunky and can be hard to use Clients are required to validate their identity to complete engagements
Outcome			
Google Forms	Google Forms is going to be a safe, low-cost choice for smaller firms or those on a budget who are already using Google Workspace. It can collect basic data and integrate with other platforms through Zapier, but its lack of powerful conditional logic and PDF output makes it less of a contender for larger firms or those who need more efficiency.		
Jotform	Jotform is our top pick for its robust functionality paired with ease of use. For non-eMoney users who want full customization capabilities, Jotform is the best solution. It is able to handle projects ranging from dynamic, e-signature contracts to document list generation and more. Jotform also has over 80+ native integrations, including Zapier. Their support is quick and reliable.		
PreciseFP	PreciseFP is industry-specific software, tailored to financial advisors. Users can get started quickly by using PreciseFP's existing template library. PreciseFP also offers 25+ integrations. The application does not allow robust customization. PreciseFP's subscription model is per user, beginning at \$60. The price decreases to \$30 per additional user.		

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