30 October 2025

Plannr integrates with ZeroKey

Plannr, fintech's modern CRM for financial advice firms, today announces an integration with the connectivity tool, ZeroKey.

Plannr brings to the market an API-first CRM, whose core mission is to build an ecosystem for the entire financial planner's techstack. Their driving force is free flowing data between platforms and adviser tools - all within one back office system - completely negating the need for re-keying and drastically improving adviser efficiencies.

A lack of integration and the need to manually key client data is frequently cited as a major pain point by financial advice firms. This development therefore represents a positive collaboration between two firms focused on solving this pain point.

The new integration (which is live and available to use) immediately connects Plannr to a range of third-party technology, enabling client data to move from one system to another without the need for manual data entry – helping save time and retain data integrity.

New connections for Plannr include multiple investment platforms for the purpose of account opening, such as Quilter, Aberdeen, Fundment and Fidelity. In addition, a range of other third-party technology such as Fintegrate and Origo's Unipass Letter of Authority is also included.

Gareth Thompson, co-founder and CTA of Plannr, commented: "We're thrilled to unveil this much-anticipated integration with ZeroKey. By facilitating effortless data exchange between systems and removing the need for duplicate entry, we're greatly enhancing adviser productivity while minimising manual inputting errors. This development broadens the range of platforms and advice tools available to our users, with data accuracy remaining the highest priority."

Joseph Williams, co-founder and CEO of ZeroKey, added: "Building individual point-to-point integrations can be a challenge for many reasons, especially when you have a core product to build, maintain, and enhance. We're therefore delighted that PlannrCRM has decided to adopt our scalable solution to complement their existing integration strategy and achieve greater connectivity, which will only continue to evolve."

To find out more about the integration and how to get started, please visit the addon store in Plannr, or contact our team for a demo at www.plannrcrm.com.

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About PlannrCRM

Plannr is a 'beautifully intuitive' CRM for modern financial planners. Plannr is on a mission with its API-first construction allowing it to rapidly build game-changing depth of connectivity with platforms and software, enabling advice firms to succeed first time, every time.

Plannr continues to grow from strength to strength and the ecosystem is only expanding as more adviser tools and platforms plug into our modern and fully open API, making the advice journey and ultimately the client journey a beautifully simple experience for all.

Contact Information: www.plannrcrm.com
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About ZeroKey

ZeroKey is on a mission to integrate technology and eliminate manual data entry. It enables financial advisers to easily integrate their tech stack and move client data from A to B, helping them save time and retain data integrity. Founded in December 2023, ZeroKey is brought to you by the same people who brought you CashCalc.