# Salesforce CRM for Wealth Management

Know why Salesforce CRM for Wealth Management is one of the most popular Advisor solutions to Wirehouses, Broker-Dealers and Independent Advisors? It's easy, powerful and collaborative. It's the next-generation solution for financial advisors, helping them manage client relationships, build their book of business, streamline their practice and handle compliance challenges. And unlike old client server technology, it's based in the Cloud – which means there's no hardware or software to install, backup, and maintain.

Every 10 years, technology makes a leap forward – today we're in the post-PC era and Salesforce continues to innovate with new internet paradigms, delivers mobile and tablet access, wraps tight enterprise class security around it, and enables it for companies of all sizes. Not only should today's business applications be fast, low cost and easy to use, but they should be social, mobile and open. That's the Social Enterprise and that's Salesforce CRM.

## The new standard for relationship managers

More than 5,000 financial services firms across the globe have standardized on Salesforce CRM, and the wealth management segment is leading the charge.

Industry leaders like TDAmeritrade, E*TRADE, Thrivent Financial, Mizuho, and United Capital Financial Advisors are jettisoning stand-alone legacy systems and choosing Salesforce CRM for its next-generation advisor desktop, and open platform. Since it's based in the Cloud, even individual advisors can sign up today and be up and running with the same world-class features as enterprise wealth management firms.

## Easily build and manage your book of business

- **Team Collaboration** – Each user has a feed, which provides a tailored update of changes, updates, assignments, calendars, discussions, and documents across your entire practice. Allowing you to ensure nothing falls through the cracks.
- **Client acquisition and management** – A complete, 360 view of clients and prospects that combines a robust client profile built specifically for advisors with best-in-class activity management capabilities.

### Features

- Full Team Collaboration
- Point and Click Customization and Workflow streamlines your practice
- Client acquisition & management
- Relationship groups & households
- Financial accounts, holdings, & interests
- Know-your-client capture & workflow
- Easy analytics with reports & dashboards
- No hardware or software to install or maintain
- Force.com platform means endless possibilities for features, integrations, and applications
- Microsoft Outlook & Lotus Notes integration
- Mobile support for BlackBerry, iPhone, iPads and Windows Mobile devices

> "In one click an advisor can view a client's current holdings. In two seconds we can pull a report…. **Salesforce is a lightning rod of efficiency.**"
>
> United Capital Financial Advisers

**For more Information**
Contact your account executive to learn how we can help you accelerate your CRM success.

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**Global Offices**

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| Asia/Pacific | +65-6302-5700 |
| EMEA | +4121-6953700 |

- **Financial accounts, holdings, and interests** – Financial information can be made available in the interface of a single application and in context with relationship and activity information.
- **Easy Lists** – Save time by automating holiday card, or monthly touch point lists with a point and click interface.
- **Know-your-client capture and workflow** – With compliance processes more important than ever, firms can be confident that the right information is captured securely. Salesforce CRM's built-in workflow and approvals engine enforces and expedites compliance procedures.
- **Relationship groups and households** – Salesforce CRM gives an aggregate view of households so that an advisor can see what's going on with a family or group, along with supporting roles like accountants or attorneys.

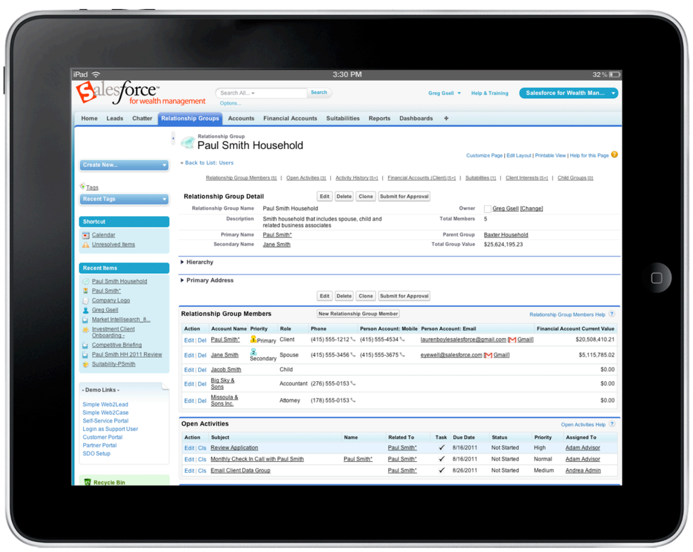
"We verified that the security management of Salesforce CRM is at the highest level in the world and is more than satisfactory for the needs of financial institutions."

Mizuho Private Wealth Management

- **Easy analytics with reports and dashboards** – More than 30 reports and 8 dashboards specifically designed for advisors, branch managers, and senior management give insight into key performance measures. Reports and dashboards are easily customized or created from scratch to fit the unique needs of individuals and firms.

## Loved by advisors

Built in close collaboration with leading wealth management firms, Salesforce CRM for Wealth Management frees financial professionals from the shackles of outdated technologies. Advisory teams find managing clients in Salesforce CRM as easy as using popular websites. Customers say their advisors not only adopt Salesforce CRM—they love it.

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