salesforce financial services cloud

Salesforce Financial Services Cloud

The World's #1 CRM, Reimagined for Financial Services

In a marketplace full of wealth management options, personalizing client relationships at scale is key to maintaining a competitive edge. Built on the Salesforce platform as a high-touch relationship management solution, Financial Services Cloud offers a 360-degree view of the client coupled with powerful analytics tools for every advisor. Now firms of all sizes can empower their advising teams with the technology needed to deliver intelligent, customized, and proactive advice across their entire book of business.

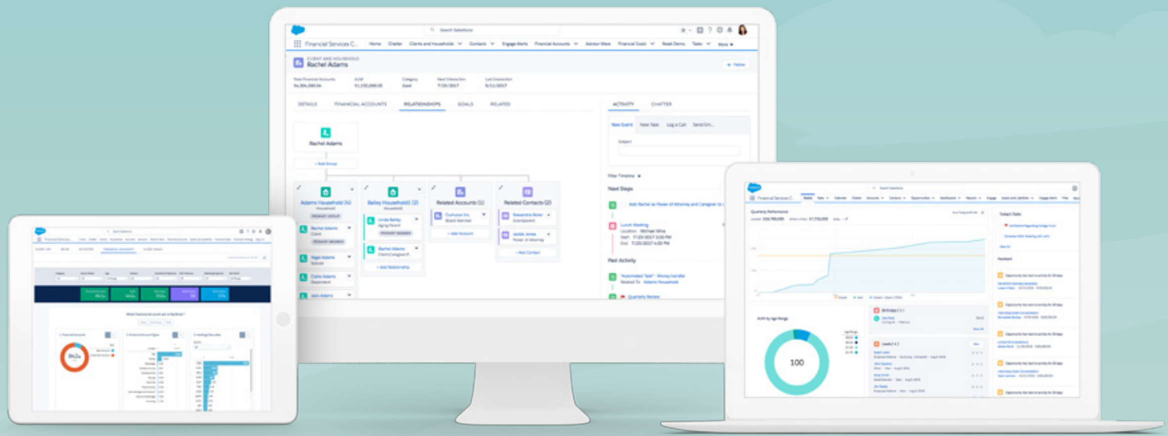
SPEED TO VALUE: Our data model comes with out-of-the-box industry standard objects built directly on the Salesforce platform that model financial accounts, assets, liabilities, and financial life goals for individual clients and entire households – saving firms time and money on customizations.

CONTINUOUS INNOVATION: With three Financial Services Cloud releases a year, advisors can accelerate business growth and maintain a competitive edge with new product features and enhancements integrated automatically into the Salesforce platform.

ROBUST PARTNER ECOSYSTEM: The flexibility of Financial Services Cloud allows for the integrations needed to seamlessly run your business, including financial planning tools, electronic forms, data aggregation services, and compliance solutions.

> "With Financial Services Cloud, we're seeing a **147% ROI** in just one year. That's substantial from any vantage point. We're really excited about what that means for our future."
>
> –NICK RICHTSMEIER
> EVP of Business Development, Trilogy Financial, and Chief Operating Officer, TrilogyCapital

Financial Services Cloud Feature Set



PERSONALIZE CLIENT RELATIONSHIPS AT SCALE

41% INCREASE IN CLIENT SATISFACTION*

- **Client and Household Profiles:** Capture financial account information, goals, interactions, and more.
- **Relationship Builder:** Connect clients to multiple households, trusts, and business groups.
- **Visual Relationship Map:** Surface the relationship networks that matter most to your clients.

SUPERCHARGE ADVISOR PRODUCTIVITY

37% INCREASE IN ADVISOR PRODUCTIVITY*

- **Proactive Engagement Cards:** Start each day with a tailored list of tasks, client life events, and opportunities.
- **Client Dashboards:** Access client metrics across your book of business with integrated dashboards.
- **In-Context Collaboration:** Connect with insurance agents, client associates, and more to ensure every advising angle is met.

WORK THE WAY YOU WANT, WHEREVER YOU WANT

36% FASTER INTEGRATION*

- **Lightning App Builder:** Build your ideal user experience with easy-to-use drag-and-drop components.
- **Customizable Communities:** Connect with essential client information in a secure, branded community.
- **Seamless Data Integration:** Aggregate client data from core systems and extended partner ecosystems with an enhanced API.

MAKE SMARTER AND FASTER CLIENT DECISIONS

40% FASTER DECISION-MAKING*

- **Measurable Advice:** Analyze the impact of advising activities against multiple financial accounts.
- **Persona-Based Analytics:** Quickly segment clients by their investment objectives, risk profiles, and more.
- **Actionable Client Insights:** Take action by logging a call, task, or event in context to client data.

AI FOR EVERY ADVISOR

Leveraging the power of artificial intelligence, **Financial Services Cloud Einstein** automatically discovers relevant client insights, predicts future outcomes, proactively recommends best next steps, and even automates advisor tasks. Now every advisor can get smarter about their client relationships with a data scientist built right into the platform.

Sign up today for a Financial Services Cloud trial. TRY FOR FREE >

* Voice of the Salesforce Financial Services Customer Survey