salesforce financial services cloud

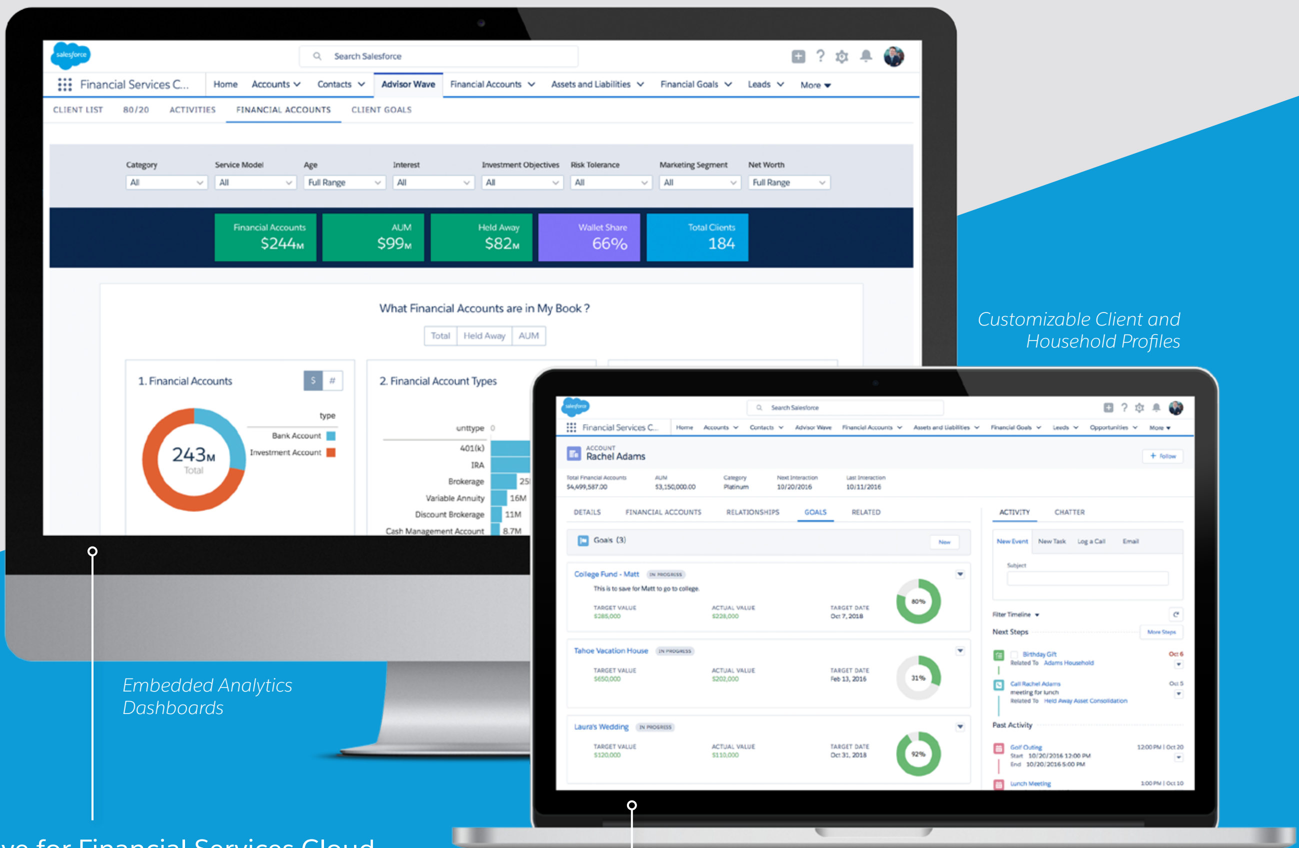
Salesforce Financial Services Cloud

The world's #1 CRM solution, reimagined for financial services.

For over a decade, financial firms have turned to Salesforce to drive productivity and manage client information. And now, with Financial Services Cloud powered by Lightning, advisors can spend even less time on admin tasks and more time helping clients achieve their life goals.

Using our latest technology to deliver proactive, personalized, and collaborative advice across any channel, advisors aren't just meeting investor expectations – they're exceeding them. The result? Stronger client relationships that last a lifetime.

Here are just some of the advantages that Financial Services Cloud has to offer:



Wave for Financial Services Cloud

Unlock client insights with a **pre-built analytics app** that comes out-of-the-box with Financial Services Cloud.

Lightning Client and Household Profiles

Customize Client and Household profiles to **instantly access the exact information you need** including financial accounts, personal goals, relationships, interactions, and more.

TAKE A CLOSER LOOK AT THE FUTURE OF FINANCIAL SERVICES

Salesforce Financial Services Cloud Feature Set:

Salesforce Shield*

In addition to Financial Services Cloud, Salesforce Shield helps you address regulatory compliance requirements by offering an extra layer of security that ensures that your client data is protected and safe.

- Field Audit Trail
- Platform Encryption At Rest
- Event Monitoring

Salesforce Financial Services Cloud

Built on the Salesforce Customer Success Platform, Financial Services Cloud includes an enhanced set of features created specifically for client engagement, and designed with the needs of advisors in mind.

Complete Client and Household Views

- Lightning Client and Household Profiles
- Financial Goals
- Household Life Events
- Household Groups
- Extended Relationship Groups

Productivity and Client Engagement

- Proactive Engagement Cards
- Customizable Advisor Home page
- Book of Business and Engagement Opportunity Dashboards
- Household, Client and Advisor Reports
- Client and Household List Segmentation
- Proactive Client Interaction Tracking
- Lead to Client Conversion
- Advisory Team Collaboration
- Financial Account Opening**

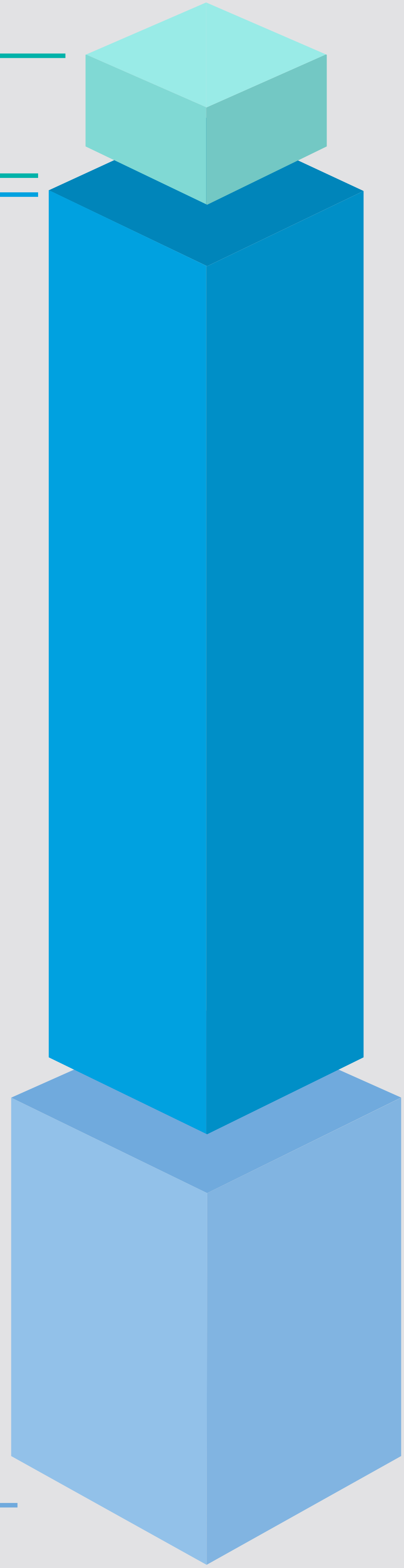
Client Data Management

- Wave for Financial Services Cloud†
- Wealth Management and Householding Data Model
- Financial Accounts, Holdings, Securities
- Asset Consolidation Workflow
- Wallet Share Calculations
- Social Media Compliance, Security and Archiving**
- Data Aggregation from Internal Systems and External Institutions**
- Account Aggregation for Personal, Held-Away and Custodial Accounts**
- Portfolio Rebalancing Workflow **

Salesforce Sales Cloud

Built on top of the world's #1 CRM, Financial Services Cloud comes out of the box with Sales Cloud to easily manage business accounts and drive stronger 1-to-1 client relationships.

- Lightning Voice
- Contacts to Multiple Accounts
- Accounts
- Activities, Tasks
- Assets
- Calendar, Events
- Campaigns
- Cases
- MyCases
- Contacts
- Content
- Contracts
- Documents
- Ideas
- Knowledge
- Leads
- Opportunities
- Orders
- Products & Price Books
- Questions & Answers
- Quotes
- Solutions
- Client Community***



**Add-on   **Via partners   ***With Community Cloud   †EE and UE Editions Only*