

Salesforce Financial Services Cloud and Salesforce Shield

Financial Services Cloud with Salesforce Shield assists financial services institutions in complying with industry regulations, such as the U.S. Department of Labor's Fiduciary Rule.

Regulatory changes in the financial services industry are requiring financial professionals to be more transparent in the way they manage their clients' investments. An example is the Department of Labor's Fiduciary Rule, which requires financial advisors and insurance agents to make

investment recommendations in the best interests of their clients. Advisors and agents are being pushed to drive *repeatable* and *visible* collaboration across the entire firm.

Financial Services Cloud combined with Salesforce Shield can support firms with visibility into interactions between clients, advisors, agents, and teams. Financial services institutions can now rely on Salesforce to assist them in putting their clients' best interests at the center of everything they do.

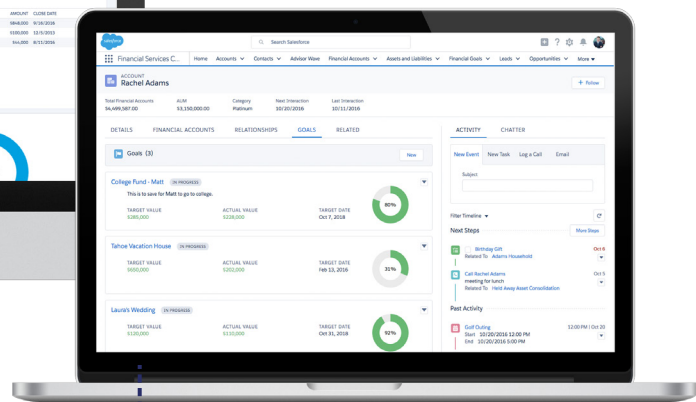


See how Financial Services Cloud can help firms address fiduciary requirements so they can spend more time on client relationships.



HELP MANAGE COMPLIANCE WITH REPEATABLE ACTIONS

Increase employee productivity by implementing firmwide to-do lists that ensure key onboarding and regulatory tasks are followed each step of the way.



GET VISIBILITY INTO CLIENT AND HOUSEHOLD INTERACTIONS

Access secure client and household profiles to instantly see who interacted with each client and the information that was shared.

See how **Salesforce Financial Services Cloud** and **Salesforce Shield** can help firms comply with fiduciary requirements.

Feature Set:



Salesforce Shield*

Salesforce Shield can be used by firms to heighten the protection of client data and provide auditable client interactions across multiple channels.



Salesforce Financial Services Cloud

With a Client Data Model at the center of Financial Services Cloud, firms can easily track client relationships and follow each interaction to help achieve compliance.



Salesforce Sales Cloud

With Sales Cloud, grow your accounts, find new customers, and close deals faster – all available natively in Financial Services Cloud.



*Add-on **Via partners