Salesforce for Wealth Management

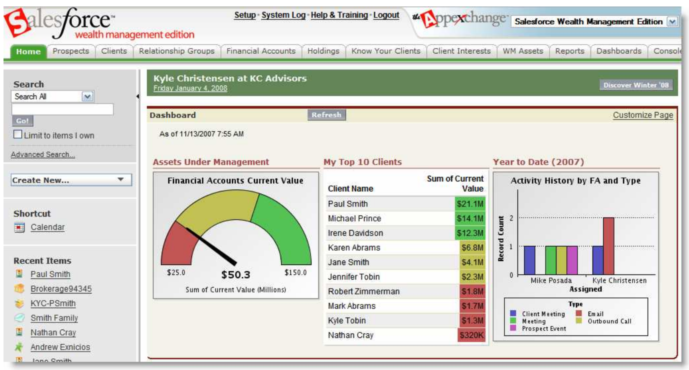
Salesforce for Wealth Management is the next-generation solution for financial advisors, helping them manage client relationships, build a book of business, and handle compliance challenges. Unlike client-server tools you've seen in the past, Salesforce uses the power of the Internet to deliver best-in-class usability and collaboration, all delivered as a service, with no hardware or software to install or maintain. And because the solution is built on the Force.com multi-tenant platform, you get automatic updates, easy customization, and rapid innovation.

People are coming into wealth at an unprecedented rate, causing the biggest shift of wealth in history. Financial services firms are racing to become the "trusted advisor" to these desirable clients and help them navigate the ever-increasing range of financial services products. At the same time, these clients have become more sophisticated and increasingly willing to switch advisors for the best available service, creating a fiercely competitive wealth management market.

But too often, financial advisors are shackled by technology. Although the Internet has changed the way that consumers bank, pay bills, get quotes, trade, or find research, advisors have been left behind. The desktops that most advisors use today have hardly changed in 20 years—they're riddled with dozens of closed, proprietary, character-based applications that are hard to use and expensive to integrate. No wonder advisors are hungry for more modern, Internet-based tools like Salesforce.

The New Standard for Relationship Managers

More than 1,600 financial services firms across the globe have standardized on Salesforce, and the wealth management segment is leading the charge. Private banking groups, mass affluent firms, retail brokers, and independent RIAs are turning to salesforce.com's software-as-a-service solution to manage their important client relationships.



With Salesforce for Wealth Management, the advisor desktop finally enters the 21st century. Industry leaders like Citigroup, E*TRADE, Merrill Lynch, Mizuho, and United Capital Financial Advisors are jettisoning stand-alone legacy systems and choosing Salesforce for its next-generation advisor desktop, open platform, easy integration with market data, and broad ecosystem of partners. With the power of salesforce.com's software-as-a-service model, even individual advisors can sign up today and be up and running next week with the same world-class features as elite wealth management firms.

The Next-Generation Desktop for Wealth Management

- Award-winning ease of use that drives end-user adoption and compliance
- Software as a service: no hardware or software to install or maintain
- Point-and-click customization to meet the needs of individual advisors
- Industry-leading features to manage client data and team activities
- Pre-integrated, add-on wealth management applications available via the AppExchange
- The flexible Force.com platform to meet even the most extensive customization and integration requirements

Loved by Advisors

Built in close collaboration with leading wealth management firms, Salesforce for Wealth Management frees financial professionals from the shackles of outdated technologies. Advisory teams find it as simple to manage clients with Salesforce as using popular consumer Web sites. And because Salesforce is available online, offline, and via BlackBerry, Palm, and Windows Mobile devices, advisory teams can provide world-class client service from anywhere. Customers say that their advisors not only adopt Salesforce—*they love it.*

Features

- Client Acquisition and Management
- Relationship Groups and Households
- Financial Accounts, Holdings, and Interests
- Know-Your-Client Capture and Workflow
- Advisor Team Collaboration
- Prebuilt Integration to Market Data Providers
- Easy Analytics with Reports and Dashboards
- No Hardware or Software to Install or Maintain
- Point-and-Click Customization for Your Unique Business
- Microsoft Outlook and Lotus Notes Integration, Mobile Support for BlackBerry, Palm, and Windows Mobile Devices

"In one click an advisor can view a client's current holdings. In two seconds we can pull a report...we've eliminated hours of busy work and streamlined 14 distinct sales organizations. Salesforce is a lightning rod of efficiency."

— United Capital Financial Partners

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

— Mizuho Private Wealth Management

Everything You Need to Build and Manage Your Book of Business

- **Client Acquisition and Management** – A complete, 360-degree view of clients and prospects that combines a robust client profile built specifically for advisors with best-in-class activity management capabilities.
- **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.
- **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’s built-in workflow and approvals engine enforces and expedites compliance procedures.
- **Relationship Groups and Households** – Salesforce gives an aggregate view of households so that on one screen, an advisor can see what’s going on with a family or group, along with supporting roles like accountants or attorneys.
- **Advisor Team Collaboration** – Advisors are increasingly partnering and collaborating with specialists and other advisors to provide superior client service. Salesforce provides the tools necessary for advisors to work together efficiently and effectively.
- **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.

Works the Way You Do

Just as you intuitively customize Google and Yahoo!, Salesforce provides a flexible wealth management solution that you can tailor to your specific business needs. Completely change layouts, add fields, activate workflow, and create reports and lists—all with a few clicks of the mouse. Salesforce can also be tightly integrated with news and market data feeds, as well as Microsoft Outlook or Lotus Notes. And, you can instantly add new functionality, such as client portfolio analysis, with pre-integrated applications from the AppExchange. Finally, the Force.com platform allows for deep customization and integration with your proprietary systems and other third-party applications.

Market Information from Interactive Data, Available on the AppExchange

Meeting Security, Performance, and Compliance Requirements

Salesforce for Wealth Management is built on the trusted Force.com platform that’s used by 41,000 companies worldwide, so you get the security, availability, and performance you need. It’s the same platform that has been thoroughly vetted by the most demanding financial institutions. And, in addition to knowing that your data is safe and always available, you’ll benefit from salesforce.com’s acclaimed commitment to customer success, based on a proven model and supported by the relentless customer focus of our people.

For More Information

Contact your account executive to learn how we can help you accelerate your CRM success, or visit our Wealth Management site: **www.salesforce.com/wm**

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