

Agentforce for Financial Services

Transform your financial institution into an Agentic Enterprise

Here's how it works.

AI is creating a turning point in financial services: accelerating competition, compressing decision timelines, and raising the bar for client experiences. For firms still navigating rising expectations, fragmented systems, and mounting compliance demands, the cost of standing still has never been greater. Agentforce for Financial Services is purpose-built for this moment, combining autonomous AI agents with deep industry data and workflows built specifically for banking, wealth management, and insurance to deliver higher advisor productivity, lower costs, a stronger compliance posture, and deeper client loyalty.

See what's included in this solution:

Industry data models:

Unify your institution on purpose-built financial services data objects and relationships for banking, wealth management, lending, and insurance, so every agent and team works from a common, industry-specific foundation right out of the box.

Pre-built business processes:

Deploy 250+ pre-built templates, subagents, and actions spanning the full financial services workflow library to build AI agents in days, not months.

AI features and functions:

Harness AI purpose-built for financial services: surfacing real-time client insights, generating relationship summaries, recommending next best actions, and enabling your agents to reason, act, and learn across every interaction.

1

Unify & Fuel

Cultivate lasting loyalty

Move beyond reactive service to deepen relationships at scale. Hyper-personalized engagement across banking, wealth, and insurance ensures every client feels known, valued, and understood.

2

Accelerate & Scale

Drive limitless growth

Automate routine workflows end to end so your team can focus on the high-value relationships and opportunities that move the business forward.

3

Anchor & Automate

Deliver anticipatory service

Surface real-time insights and life events across your entire book of business, so your team can reach clients at the right moment before they ever have to ask.

4

Secure & Protect

Stay compliant

Embed governance directly into every workflow for both your human teams and your AI agents, so compliant outcomes aren't an afterthought. They're built in.

How can agentic AI help your financial institution?

88%

of organizations now use AI in at least one business function

[McKinsey, State of AI, 2025](#)

77%

of financial services executives achieve AI ROI in one year

[Google Cloud, AI Agents in Financial Services Report, 2025](#)

20%

productivity gain from AI among financial services firms

[Bain & Company, AI in Financial Services Survey, 2024](#)

Learn more about Agentforce for Financial Services:

Salesforce.com/financial-services/artificial-intelligence/

Agentforce for Financial Services

Unify and Fuel

Cultivate deeper relationships across every client, channel, and line of business

Turn every client data point into a unified, real-time view of who each client is and what they need. Every advisor, banker, and service rep gets the full client picture to deliver hyper-personalized experiences across banking, wealth management, and insurance.

360-Degree view

Consolidate data across products, channels, and relationships into one complete, accurate picture of who each client is and what they need next. Equip every team member with one source of truth to reference and act on.

Real-time signals

Surface behavioral and financial signals, from portfolio shifts to life event triggers, the moment they happen. Ensure your team always has the most current, actionable information before every client interaction.

Predictive insight

Anticipate client needs before they arise with AI-powered propensity models that identify churn risk, upsell opportunities, and life event triggers across your entire book of business.

Unified client profile

Connect disparate systems and fragmented data points into a single, real-time client view. Give every advisor, banker, and service rep the full context they need to engage with confidence.

60

Minutes of advisor
time saved per
meeting

50%

Reduction in data
management costs



Agentforce for Financial Services

Accelerate and Scale

Free your team to close more, grow more, and never miss an opportunity

Streamline end-to-end financial services workflows, from onboarding and renewals to dispute resolution and commission reconciliation, so your sales team spends less time on admin and more time driving growth.

Faster deal cycles

Accelerate pipeline with AI-powered opportunity scoring, guided next steps, and automated deal workflows that eliminate bottlenecks and keep every relationship moving forward.

Warm referral routing

Route cross-line-of-business referral opportunities to the right expert automatically, with intelligent scoring that tracks every warm lead so nothing falls through the cracks.

Automated meeting assistance

Equip every advisor and banker with an AI-generated pre-meeting brief – surfacing recent interactions, portfolio changes, and recommended talking points, so your team arrives fully prepared to deepen the relationship.

Proactive outreach

Identify the right moment to reach out, and act on it automatically with AI-triggered alerts that surface timely, relevant reasons to connect across every client in your book.



“Agentforce is going to allow us to give our teams superpowers. We can automate back-end work, allowing employees to focus on what matters most — keeping customer promises and driving profitable growth.”

Bob Bastian | Chief Information and Technology Officer
for Global Retirement and Insurance, Prudential



Agentforce for Financial Services

Anchor and Automate

Deliver anticipatory service that keeps clients coming back

Surface real-time insights, life events, and behavioral signals across your entire book of business, so your team can proactively reach out at the right moment before clients ever have to ask. With AI agents working alongside every advisor, banker, and service rep, anticipatory service stops being an aspiration and starts being your standard.

Increased Accuracy

Eliminate manual data entry and human error by automating intake, routing, and resolution workflows with AI agents trained on financial services data. Deliver consistent, compliant outcomes every time, no matter the channel or the rep handling it.

Faster Decisions

Accelerate resolution times by equipping agents and teams with real-time recommendations, guided next steps, and automated approvals, so every decision is made with full context and confidence.

Proactive Service

Trigger automated, personalized outreach based on portfolio movements, life events, or service thresholds to reach clients at the right moment, before they ever have to ask.

24/7 Self Service

Deploy AI agents that handle service requests, answer questions, and resolve issues around the clock to give clients instant, accurate responses on any channel, any time.



“Agentforce turns on 24/7 service so we can say, ‘Hey, you want to call at 3:00 a.m. because you’re busy and you work an abnormal schedule? Great. We have somebody ready to answer questions for you.’”

Aaron Witt | Chief Digital & Data Officer, Sammons Financial Group



Agentforce for Financial Services

Secure and Protect

Make every interaction compliant by design

Embed governance controls directly into every workflow and agent interaction to ensure every client touchpoint, human or automated, meets your institution's regulatory requirements without slowing your team down.

Embedded controls

Regulatory requirements are built directly into every workflow and agent interaction, so your teams aren't chasing compliance after the fact. Every client touchpoint meets your institution's standards, automatically.

Real-time reporting

Monitor compliance coverage and effectiveness across your entire institution in real time, with dashboards that map every regulation to the specific controls protecting your business. Turn compliance data into business intelligence that continuously strengthens your risk posture.

Zero-copy architecture

Access and activate data across your institution without ever moving or replicating it. Preserve data sovereignty and eliminate governance complexity, without the overhead of traditional data pipelines.

AI guardrails and safety

Protect every agent interaction with personally identifiable information masking, prompt injection defense, and deterministic guardrails that ensure your AI never goes off-script. Maintain full human oversight and control over every autonomous action your agents take.

\$4.4M

is the global average cost of a single data breach

97%

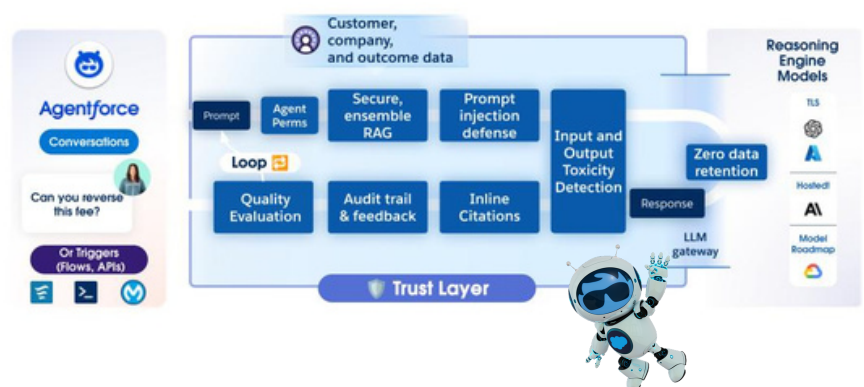
of AI breaches stem from poor access controls

\$670k

in average compliance fines involving unsanctioned AI tools

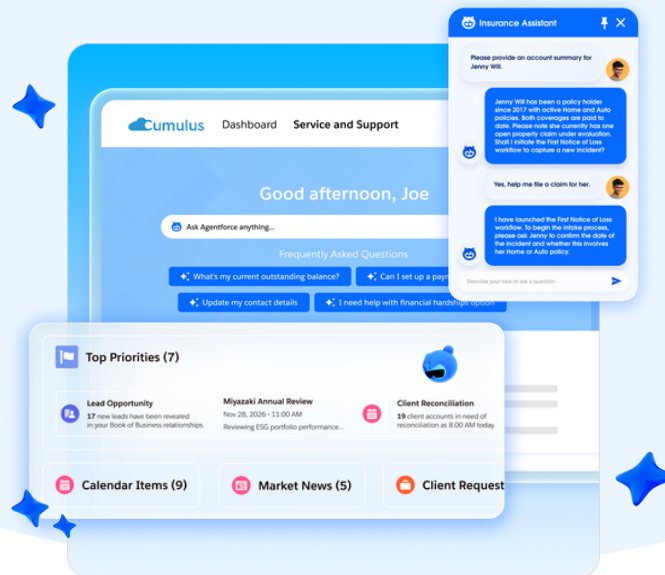
Source: [IBM Cost of a Data Breach Report \(2025\)](#)

Agentforce Trust Layer



Learn more about Salesforce's compliance policies, protocols, and guidelines:

Salesforce.com/company/legal/compliance



Become an agentic enterprise that grows smarter, serves faster, and complies by design with Agentforce for Financial Services

Purpose-built for banking, wealth management, and insurance, Agentforce for Financial Services gives your teams the industry expertise, AI agent building blocks, and built-in governance to move fast and scale with confidence.

[Contact us](#)

Learn more about upgrading to Agentforce for Financial Services.

[Access a free trial](#)

Sign up here for a free 30-day trial of Agentforce for Financial Services.

[Watch a demo](#)

Watch our Agentforce for Financial Services demo to discover how it can benefit your business.

