



Unlock **limitless growth** with AI-powered selling

Agentforce Financial Services for Sales transforms your entire sales process, bringing AI agents and financial services sellers together at every step to increase seller capacity and drive revenue growth

Empower bankers, financial advisors, and insurance producers with AI automation, real-time intelligence, and industry-specific workflows that help every seller focus on what matters most: strengthening relationships and closing deals.



Accelerate growth and deepen client relationships with the #1 AI CRM for financial services.



Increase productivity with AI agents

Deploy AI agents 24/7 to autonomously handle repetitive tasks, expand your pipeline, and boost revenue without adding headcount.



Give sellers the ultimate winning edge

Equip sellers with real-time data and AI insights so they can cut through the noise, deliver more personalized financial guidance, and close more deals, faster.

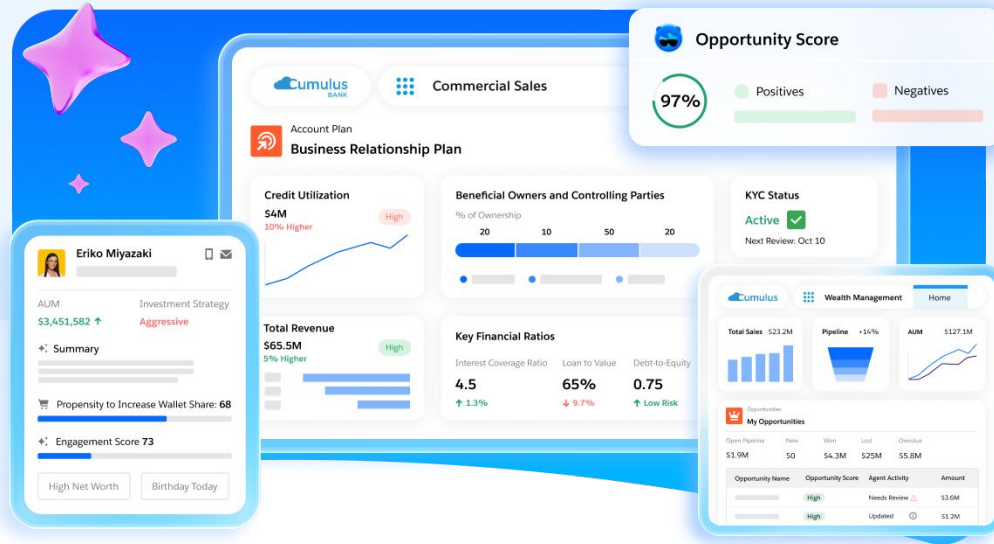


Drive operational efficiency on a single platform

Automate, optimize, and unify your sales cycle from cross-LOB referrals to guided financial discovery, complex deal orchestration, and onboarding & KYC.

Contact us to learn more about Agentforce Financial Services

salesforce.com/financial-services/cloud



Here's how it works.

Only 30% of financial services reps' time is spent selling. With Agentforce Financial Services, every advisor, banker, and producer now has a digital workforce working alongside them – prebuilt industry agents that automate prospecting, prep meetings, proactively surface needs and next best actions, and streamline manual deal tasks. Built on the industry's most complete data foundation, every action is grounded in client context – portfolios, policies, life events, and relationship histories. Your people focus on growth. Agents handle the rest.



Unify data into a 360° view

Break down silos across systems and data to create a single, trusted Client 360 that unifies accounts, portfolios, policies, life events, and relationships across the business.

Multiply seller capacity with AI agents

AI agents reduce manual work, conduct research, and take action—preparing meetings, capturing updates, and supporting every seller in real time.

Turn real-time insights into revenue opportunities

Highlight emerging client needs and direct sellers to the highest-impact actions with contextual intelligence built on real-time financial activity.

Connect and accelerate the entire sales cycle

Move faster from prospecting through onboarding by streamlining workflows, simplifying handoffs, and reducing friction across the sales process.

Drive predictable performance and revenue growth

Improve performance with clear visibility into pipeline, coverage, and outcomes so leaders can forecast accurately and scale growth.



Unify client, relationship and financial data into a 360° view.

Industry Data Model For Financial Services

Unify accounts, portfolios, policies, and relationships in a purpose-built data model designed for banking, wealth, and insurance.

Role Based Seller Consoles

Deliver tailored experiences for advisors, bankers, and insurance producers with the most relevant client data, actions, and insights in one place.

Goals, Interests, And Life Events

Capture client intent through goals, product interests, and key milestones to drive more relevant and personalized engagement.

Dynamic Client 360

See every account, interaction, transaction, and relationship in one complete view so sellers always have full context for every client.

Flexible Relationship & Hierarchy Mapping

Model complex relationships across individuals and organizations to understand ownership, influence, and financial connections.

Actionable Segmentation

Group clients by financial behavior, goals, and signals to enable precise targeting and personalized outreach at scale.

Data Cloud For Financial Services

Unify structured and unstructured data with zero-copy integration to create dynamic profiles that give agents real-time context and memory for every interaction.

Pre-Built Connectors

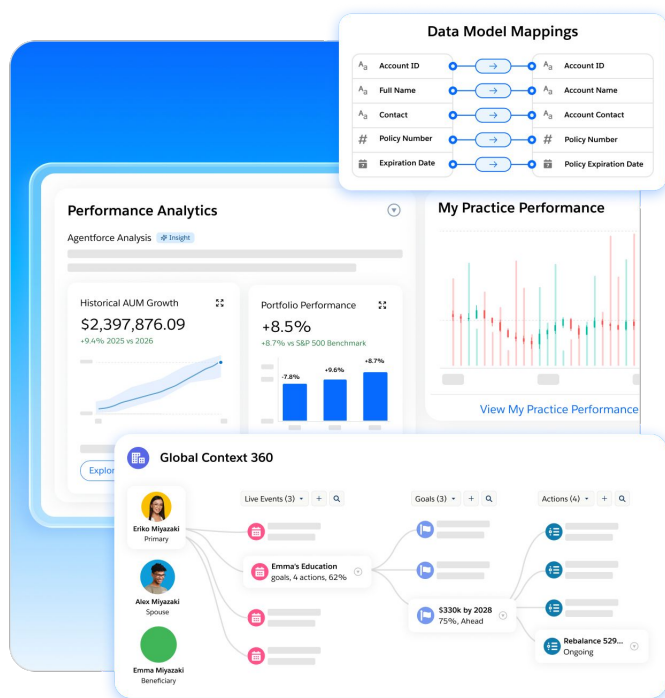
Connect core banking systems, custodians, policy platforms, and third-party data with pre-built integrations that eliminate custom work and unify data across systems.

Calculated Financial Insights

Transform raw financial data into calculated metrics like net worth, cash flow, wallet share, and financial health to give sellers a deeper understanding of every client.

Data Activation Across Agents And Workflows

Activate unified data across agents, workflows, and systems to turn insights into action across the full sales lifecycle.



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Multiply seller capacity with AI agents that don't just assist, but act.

Meeting Lifecycle Automation

Prepare for every client interaction with AI-generated briefs and full client context, capture key decisions, and turn conversations into action with automated next steps.

Client & Relationship Intelligence

Bring together accounts, portfolios, policies, and relationships into clear, actionable summaries that give sellers the full context behind every client interaction.

Automated Research & Contextual Insights

Analyze financial activity, engagement history, and external data to deliver relevant insights before and during interactions—eliminating manual research and guesswork.

Pre-Built Financial Services Agents

Activate pre-built agents designed for banking, wealth, and insurance use cases to accelerate time to value and scale high-impact workflows across teams.

AI-Powered Day Prioritization

Continuously surface the highest-priority clients, opportunities, and actions based on real-time data so sellers can focus on what matters most every day.

Real-Time Signals & Event Detection

Detect changes in client behavior, financial activity, and lifecycle events to enable timely, proactive engagement.

Next Best Action & Opportunity Guidance

Recommend the most relevant actions, outreach strategies, and growth opportunities based on client context and business priorities.

Automated Financial Services Workflows

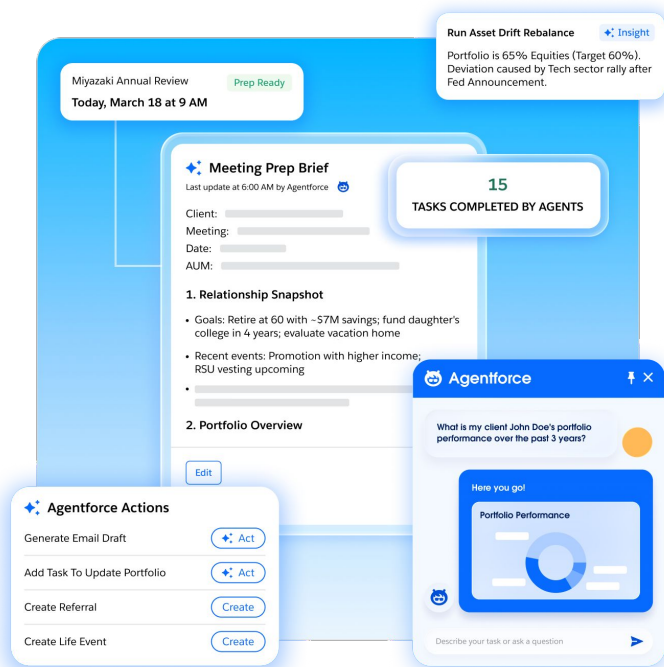
Automatically generate communications, create tasks, update records, and trigger workflows to offload manual admin and time-consuming work from your sellers' plates.

Seller Coaching & Performance Guidance

Provide in-the-moment coaching, recommendations, and feedback to help sellers improve engagement quality and drive better outcomes.

Conversational AI for Sellers

Enable sellers to interact with agents naturally to retrieve insights, generate content, and take action directly within core systems—all in the flow of work



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Turn real-time signals into revenue opportunities with timely AI insights.

AI-Powered Client Insights

Analyze client data, financial activity, and engagement history to surface what matters most across relationships and opportunities.

Real-Time Signals

Surface changes in financial activity, client behavior, and lifecycle events to highlight emerging needs and opportunities.

Opportunity Scoring And Prioritization

Rank opportunities, accounts, and leads based on value and likelihood to convert so sellers focus on the highest-impact work.

Predictive Revenue Insights

Identify clients likely to churn, consolidate assets, or require new products to proactively drive growth and retention.

Pipeline And Deal Intelligence

Understand deal progression, pipeline health, and risk to identify where opportunities are advancing or stalling.

Book Of Business Insights

Monitor performance across clients, accounts, and lines of business with visibility into growth, concentration, and trends.

Product Recommendations And Whitespace

Identify gaps in coverage and recommend relevant products based on client needs, financial position, and behavior.

Purpose-Built Financial Services Analytics

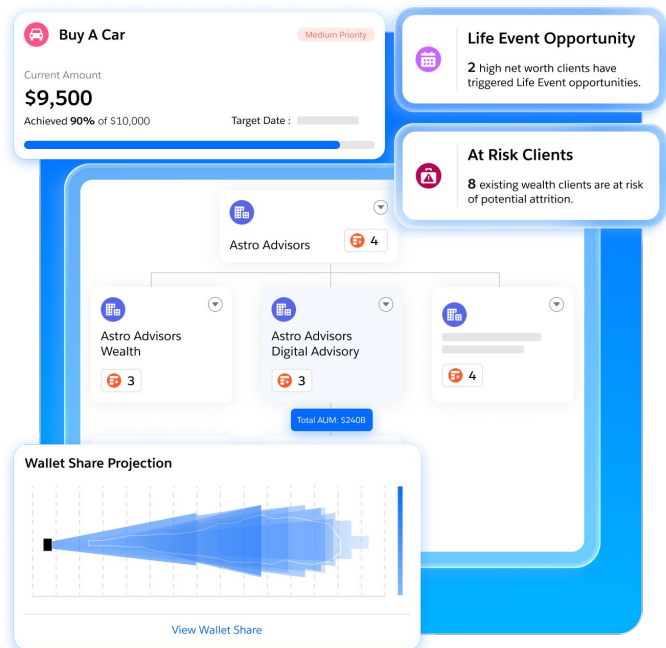
Access dashboards and reporting designed for banking, wealth, and insurance to understand performance across clients, accounts, and pipelines.

Client And Relationship Intelligence

Understand client context, stakeholders, and relationship dynamics to navigate complex financial relationships and uncover growth paths.

Integrated Alerts And Notifications

Trigger alerts for key events like large transactions, policy changes, and engagement shifts so sellers never miss critical moments.





Connect and accelerate the entire sales cycle with purpose-built financial services workflows.

Prospecting, Lead, And Opportunity Management

Capture pipeline, manage leads, and convert opportunities with full visibility into sales activity and progression across every stage.

Financial Deal Management

Manage complex financial deals from pitch to execution with full visibility into stakeholders, stages, and deal progress in a single system.

Guided Financial Discovery Frameworks

Standardize client discovery with structured, compliant frameworks that capture financial needs, risk profiles, and requirements.

Intelligent Need-Based Referrals

Capture, score, and route referrals across lines of business to connect clients with the right financial experts and drive coordinated growth.

Strategic Account Planning And Management

Build account plans, manage ongoing client relationships, and coordinate growth strategies across accounts and lines of business.

Client Onboarding And Account Opening

Streamline onboarding with integrated workflows for account opening, e-signatures, and client activation to reduce friction and accelerate time-to-revenue.

KYC, Document Collection, And Verification

Track, collect, and verify required documents and KYC information with structured checklists and automated workflows.

Intelligent Document Processing

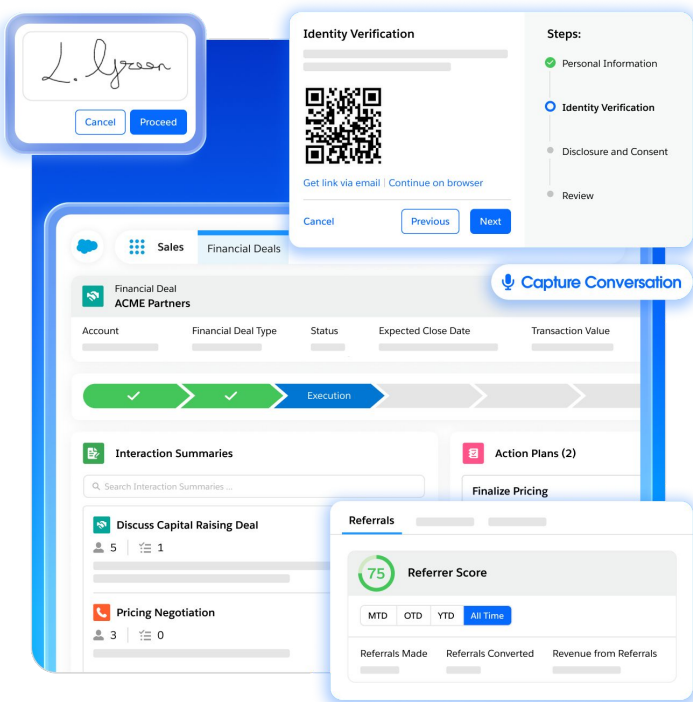
Extract and populate data from forms and documents using OCR and automation to reduce manual entry and improve accuracy.

Compliant Data Sharing and Processes

Embed regulatory controls, approvals, and cross-team coordination into sales and onboarding processes to ensure compliance and alignment.

Action Plans, Workflow, And Team Execution

Coordinate tasks, milestones, and stakeholders across teams with structured action plans that keep deals progressing and aligned.





Drive predictable performance and revenue growth with smarter intelligence.

AI-Driven Forecasting

Predict revenue across deposits, policies, AUM, and pipeline with AI-driven forecasts built for financial services complexity.

Sales Performance Dashboards

Monitor team performance, pipeline, and revenue metrics with real-time dashboards and competitive leaderboards.

Book Of Business And Practice Management

Understand performance across books of business, branches, and advisory practices to optimize growth and accountability.

Territory And Capacity Planning

Balance workload and assign territories to ensure resources are aligned to revenue potential and growth opportunities.

Sales Programs And Enablement

Deliver structured onboarding, training, and sales programs to help teams ramp faster and scale best practices.

Agentforce Sales Coaching

Provide ongoing coaching, feedback, and performance visibility to improve seller effectiveness and consistency.

Incentive and Commission Management

Automate complex commission structures across fee-based, commission-based, and hybrid models with fast, transparent payouts that motivate sellers and drive performance.

Pipeline Inspection And Deal Health

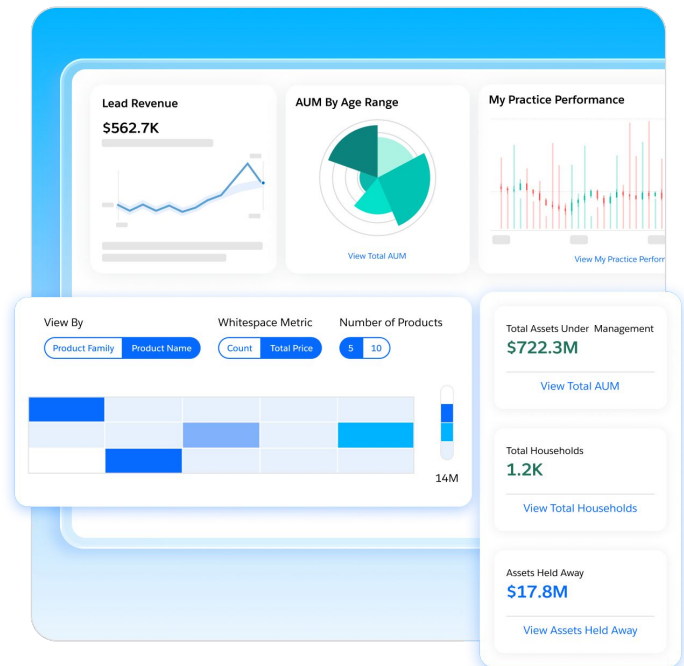
Inspect pipeline changes, track deal progression, and identify risk to improve forecast accuracy and drive accountability.

Revenue Drivers And Performance Insights

Understand what's driving performance across products, teams, and segments to identify where to double down or course-correct.

Revenue Planning And Quota Management

Align teams around revenue goals with structured planning, target setting, and quota allocation across your organization.



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The platform leading financial services institutions use to win.



Engineered for financial services, not adapted to it.

Industry-specific data models, workflows, and AI, grounded in decades of domain expertise.



Agents that act, not just answer.

Agentic AI that monitors real-time signals, identifies top priorities and takes action across seller workflows.



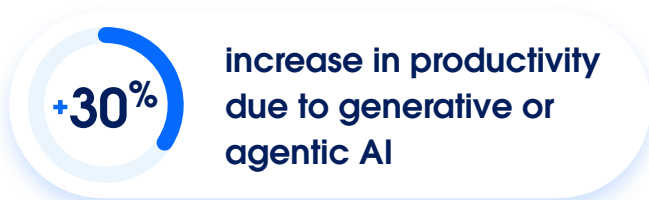
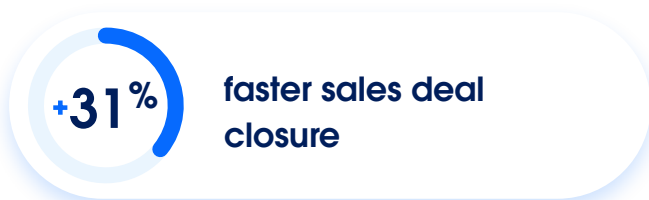
No Swivel. No Silos. One Platform.

Harmonize data and workflows from core systems and tools in the platform where selling already happens.



Trusted by the world's largest FSIs.

Enterprise-grade security, compliance-ready architecture, and auditability designed for highly regulated financial environments.



“Our sales lifecycle runs on Financial Services Cloud. From managing a lead, to prepping for meetings, to closing an opportunity, it helps us strengthen our customer relationships.”



Sandeep Ajith
VP, Data and Analytics and Chief Product Owner of the Agentforce 360 Platform
Prudential

Source: Salesforce FY25/26 Financial Services Customer Success Metrics

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Compare Agentforce Financial Services for Sales Editions and Features

Feature	Financial Services Cloud Sales Enterprise	Financial Services Cloud Sales Unlimited	Financial Services Cloud Sales Agentforce1
Account and Contact Management	✓	✓	✓
Lead, and Opportunity Management	✓	✓	✓
Actionable Relationship Center	✓	✓	✓
Actionable Segmentation	✓	✓	✓
Activity Capture	✓	✓	✓
Activity Management	✓	✓	✓
Advanced Forecast & Pipeline Management	✓	✓	✓
Advanced Pipeline Management	✓	✓	✓
Agentforce: Lead Nurture, Sales Coaching, Pipeline Management, Sales Actions	\$	\$	\$
AI Activity Capture for Financial Services	Max 100 user per org	✓	✓
AI Email Insights	\$	✓	✓
AI Forecasting	\$	✓	✓
AI Opportunity Scoring	✓	✓	✓
AppExchange	✓	✓	✓
Approval Processes	✓	✓	✓
Branch and Practice Management	✓	✓	✓
Business Owner and Controlling Party Data Model	✓	✓	✓
Business Relationship Planning (B2B)	✓	✓	✓
Campaign Management	✓	✓	✓
Client Segmentation	\$	\$	✓
Consumption Forecasting	✓	✓	✓
Contracts	✓	✓	✓
Conversation Insights	✓	✓	✓
Customizable Profiles and Page Layouts	✓	✓	✓
Customizable Sales Process	✓	✓	✓
Data Synchronization & Harmonization	✓	✓	✓



Feature	Financial Services Cloud Sales Enterprise	Financial Services Cloud Sales Unlimited	Financial Services Cloud Sales Agentforce1
Deal Insights	✓	✓	✓
Developer Pro Sandbox	\$	✓	✓
Developer Sandbox	✓	✓	✓
Duplicate Blocking	✓	✓	✓
Email Integration with Gmail or Outlook	✓	✓	✓
Email Productivity	✓	✓	✓
Embedded Forecast Charts	✓	✓	✓
File Storage Per User	✓	✓	✓
Financial Deal Management	✓	✓	✓
Financial Goals and Plans	✓	✓	✓
Flexible Hierarchies	✓	✓	✓
Flow Orchestration	600 runs per year	600 runs per year	600 runs per year
Forecasting Mobile App	✓	✓	✓
Full Offline Mobile Functionality	✓	✓	✓
Full Sandbox	\$	1 per org	1 per org
Lead Assignment and Routing	✓	✓	✓
Lead Management	✓	✓	✓
Lead Scoring	\$	✓	✓
Lightning Platform	✓	✓	✓
Mass Email	✓	✓	✓
Onboarding Console Application	✓	✓	✓
Opportunity Management	✓	✓	✓
Opportunity Scoring	✓	✓	✓
Opportunity Splits	✓	✓	✓
Orders	✓	✓	✓
Partial Sandbox	1 per org	1 per org	1 per org
Person Accounts	✓	✓	✓
Predictive Forecasting	\$	✓	✓



Feature	Financial Services Cloud Sales Enterprise	Financial Services Cloud Sales Unlimited	Financial Services Cloud Sales Agentforce1
Premier Success Plan	\$	✓	✓
Product & Price Books	✓	✓	✓
Quotes	✓	✓	✓
Quotes & Contracts	✓	✓	✓
Record Types (Per Object)	✓	✓	✓
Roles and Permissions	✓	✓	✓
Sales Cloud Everywhere	✓	✓	✓
Sales Console Apps	✓	✓	✓
Sales Engagement & Conversation Intelligence	\$	✓	✓
Sales Planning, Programs, Incentive Compensation Management	\$	✓	✓
Sales Signals & Call Summaries	\$	\$	\$
Sales Teams	✓	✓	✓
Sales Territories	✓	✓	✓
Salesforce Meetings	✓	✓	✓
Signature Capture (Form-based in Discovery Framework)	\$	\$	✓
Tear Sheet Generation	✓	✓	✓
To Do List	✓	✓	✓
Unlimited Custom Applications	✓	✓	✓
Waterfall Chart	✓	✓	✓
Web-to-Lead Capture	✓	✓	✓
Action Plans	✓	✓	✓
Advanced Reporting Features	✓	✓	✓
Banker, Advisor, and Insurance Producer Consoles	✓	✓	✓
Business Rules Engine	10,000 calls org/month	50,000 calls org/month	50,000 calls org/month
Case Management	✓	✓	✓
Chatter	✓	✓	✓
Client Financial Profile	✓	✓	✓
Customizable Reports and Dashboards	✓	✓	✓



Agentforce Financial Services for Sales



Feature	Financial Services Cloud Sales Enterprise	Financial Services Cloud Sales Unlimited	Financial Services Cloud Sales Agentforce1
Data Storage Per User	✓	✓	✓
Disclosure and Consent Management	✓	✓	✓
Discovery Framework	✓	✓	✓
Document Generation	✓	✓	✓
Document Tracking and Approvals	✓	✓	✓
Email Templates	✓	✓	✓
Files	✓	✓	✓
Financial Accounts & Transactions	✓	✓	✓
Flex Cards	✓	✓	✓
Flow Builder	✓	✓	✓
Household and Relationship Groups	✓	✓	✓
Identity and Screening Verification	✓	✓	✓
Industry Specific Data Models	✓	✓	✓
Knowledge	Read only	Read only	Read only
KYC Data Model	✓	✓	✓
Life Events & Business Milestones	✓	✓	✓
Lightning App Builder	✓	✓	✓
OmniStudio	100,000 calls org/month	1,000,000 calls org/month	1,000,000 calls org/month
Record Alerts	✓	✓	✓
Referral Management	✓	✓	✓
Salesforce Mobile App	✓	✓	✓
Stage Management	100,000 calls org/month	1,000,000 calls org/month	1,000,000 calls org/month
Task Management, Activity Feed	✓	✓	✓
Topics and Recommendations	✓	✓	✓
Web Services API	✓	✓	✓
Agentforce for Financial Services Cloud	\$	\$	✓
Asset Scheduling - Unlimited Edition	\$	\$	✓
Customer Data Cloud - Data Services Card (100K)	\$	\$	✓



Agentforce Financial Services for Sales



Feature	Financial Services Cloud Sales Enterprise	Financial Services Cloud Sales Unlimited	Financial Services Cloud Sales Agentforce1
Data Cloud Provisioning - Einstein 1 Edition	\$	\$	✓
Digital Engagement - Unlimited Edition	\$	\$	✓
Flex Credits for Agentforce	\$	\$	✓
Revenue Cloud Events	\$	\$	✓
Sales Planning - Unlimited Edition	\$	\$	✓
Salesforce Foundations	\$	\$	✓
Salesforce Maps - Unlimited Edition	\$	\$	✓
Salesforce Scheduler - Unlimited Edition	\$	\$	✓
Slack Enterprise Plus	\$	\$	✓
Spiff Platform	\$	\$	✓
Tableau Next Creator	\$	\$	✓
Relationship Agent	\$	\$	✓
Financial Advisor Agent	\$	\$	✓
Financial Services Cloud Intelligence	\$	\$	✓