

## Enhance the advisor experience with an extended and seamlessly connected Salesforce platform.

Firms are proactively working to enhance efficiency and productivity while ensuring a high-quality experience for both employees and clients.

With Wealth Navigator, advisors can now leverage Salesforce as their platform for providing a comprehensive end-to-end advisor experience that could seamlessly connect with the broader technology ecosystem.







Wealth Navigator extends the capabilities of Salesforce Financial Services Cloud by delivering a comprehensive experience across Sales, Client Onboarding, Financial Planning, Portfolio Management and Service functions.



1

### Real-time Client and Account Onboarding





Facilitate guided flow and user-friendly completion of client onboarding and account opening process from start to finish within Salesforce. Wealth Navigator provides:

-  Data Capture and Intake
-  Screening
-  Document Generation
-  Multi-Account Opening and Funding
-  Multi-Custodian Integration Design
-  Compliance and Regulation

2

### Financial Planning





Incorporate goals-based and financial planning within the client management capabilities of Salesforce to factor in more value-centric client data points.

-  Goal Logging
-  Goal Tracking
-  Synchronization with Financial Accounts
-  Action Plans

3

### Portfolio Management and Trading




Integrate contemporary trading and portfolio reporting functions that could be scaled to books-of-business levels, allowing for monitoring of portfolios and entire book of business directly within Salesforce.

-  Book of Business Transparency
-  Alerts and Monitoring
-  Document Management
-  Account Maintenance

4

### Ongoing Client Servicing

Provide essential tools for a more streamlined, automated, and efficient client servicing process. Leverage Salesforce tools such as flows and omni script to reduce manual workload for advisors.

-  Pre-built workflows
-  Servicing tools (i.e. case, approvals, assignment, etc.)
-  Integrations

## Delivering a Comprehensive Wealth Advisor Desktop

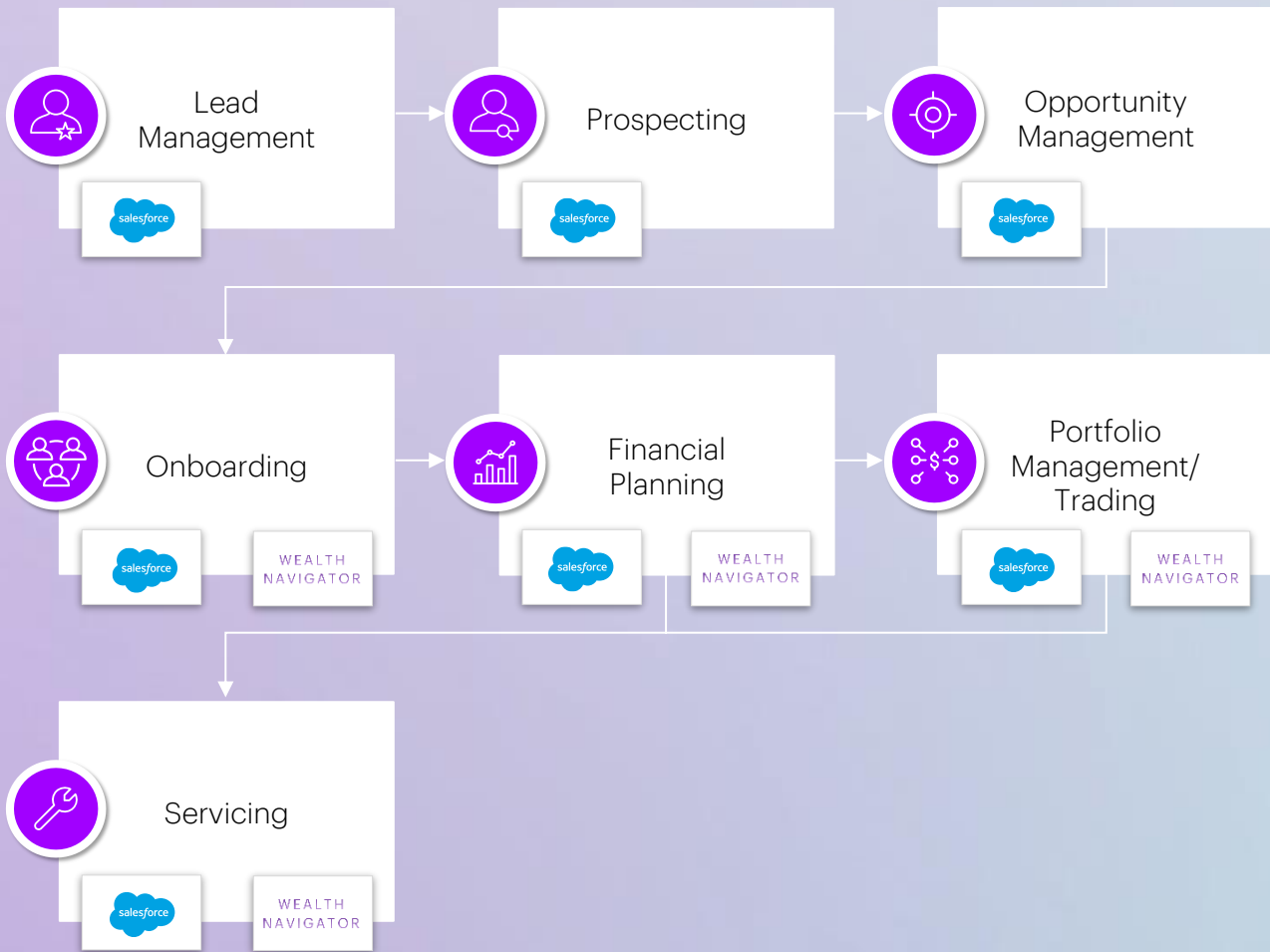
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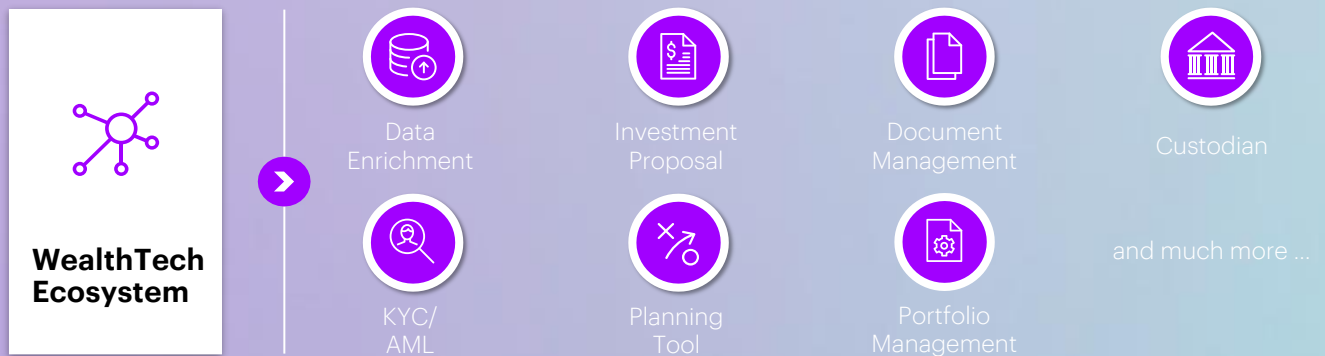
WEALTH  
NAVIGATOR



# The Wealth Navigator Experience



## Integration Orchestration Layer



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