Wealth Navigator

Accenture Connected Wealth Management
Advisor Experience for Salesforce

accenture | salesforce

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

Powered by salesforce + WEALTH NAVIGATOR + WealthTech Ecosystem

The Wealth Navigator Experience

- Lead Management
- Prospecting
- Opportunity Management
- Onboarding
- Financial Planning
- Portfolio Management/ Trading
- Servicing

Integration Orchestration Layer

WealthTech Ecosystem

- Data Enrichment
- Investment Proposal
- Document Management
- Custodian
- KYC/ AML
- Planning Tool
- Portfolio Management
- and much more ...

Contact us:

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Visit us at **www.accenture.com**

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