fortimize

One-Pager

Enhance Client Relationships in Wealth Management with Salesforce

Wealth management services are crucial for growing client relationships at your financial institution. For over a decade, Fortimize has helped financial services firms strengthen these relationships by eliminating manual processes and providing clear visibility into their business. With **Salesforce Financial Services Cloud** and integrated backend platforms, you can make data-driven decisions to offer timely and relevant recommendations.

SALESFORCE FINANCIAL SERVICES CLOUD BENEFITS

- Automate the client onboarding experience.
- Monitor KYC tasks and compliance with automated approvals.
- Record held-away assets and identify wallet share opportunities.
- Report on external referrals and track COI outcomes.
- Manage cases like document requests and money transfers, using Einstein AI for fast live chat.
- Create Client Action Plans to track life events, goals, reviews, and disbursements.
- Provide a 360-degree view of client relationships across your institution with integrated systems.

CLIENT SUCCESS STORY

An $8B Texas-based bank aimed to enhance wealth client relationships by streamlining onboarding and improving fund distribution for quick disbursements to beneficiaries. By partnering with Fortimize and using Salesforce Financial Services Cloud, they eliminated data silos and digitized onboarding, fund distribution, and client interactions. Integrations with Fiserv and Fitek through MuleSoft now provide a unified view of client accounts, enabling the wealth management team to see real-time data and insights to recommend relevant financial products.

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ABOUT FORTIMIZE

Fortimize is a team-owned consulting firm dedicated to delivering Salesforce and Data & Analytics solutions tailored for the Financial Services industry. Since 2012, we've successfully implemented, scaled, and supported more than 1,000 projects for customers across North America, serving as a catalyst for strategic business growth.

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