

SALNTICA

advisor desk



Complete View with iParties

- Graphically understand all account influencers, such as lawyers, accountants, portfolio managers, trustees and more
- Understand your virtual team that sells services and manages your clients

Effective Communication

- Powerful Mail Merge capabilities: Using familiar Microsoft tools, create lists for customized mailing
- Targeted Email Broadcasts: Send only the marketing, product and research information your clients want—in their preferred format

“Salentica has the background and experience to deliver the solutions that address the unique needs of financial services firms”

*David Sugarman
Microsoft Industry Partner Manager*

For wealth managers, registered investment advisors, family office, retail brokers and insurance agencies/brokers

Optimize your wealth client relationships

Know Your Client (KYC)

- Fast access to information, by client or household
- Client information, including personal information, trades, holdings and performance, presented from your back office systems
- Views of all client touch points and documents, with security-controlled access

Works the Way You Do

- Automatically attaches client emails to client records in the Microsoft CRM for easy access at the client or household level. No more folders in Outlook with client emails.
- One-Click Call Lists — fast and easy to use for power users and technology rookies alike
- Easily imports and manages leads from all sources including the web
- Leverages advanced individual and group emailing capabilities, including the ability to personalize emails with CRM fields and track responses

Alerts and Notifications

- Alerts financial advisors and their team when significant events happen, such as trades, purchases, asset mix imbalances, sales, new clients and more
- With Salentica Call Reporting, automatically notifies client team members in real time of important calls

Works with Your Technology

- Familiar Microsoft look and feel
- Works with your choice of PDA
- Easy mail creation using Microsoft Word from the Microsoft CRM Outlook client
- Exports to Excel

Solution benefits

Track and close sales • Market more effectively • Strengthen oversight and compliance • Drive efficiency

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