FSConnect for Wealth Banking

FSConnect for Wealth Management is an accelerated banking solution by Deloitte Digital that extends the functionality of Salesforce's cloud products.
The asset is designed to rapidly create and enhance value for private banking and wealth management financial advisors and partners. The solution encompasses a wide range of leading cloud vendors and financial technology (FinTech) firms, enabling clients to benefit from pre-integrated partner technologies.

This innovative solution leverages the power of Salesforce's Agentforce platform, Anthropic's advanced Large Language Model (LLM), and Amazon Bedrock's secure, fully-managed service for building and scaling GenAI applications.

CAPABILITIES

Dynamic Advisor Home Page + Household 360

A wealth advisor begins their day by accessing the CRM Analytics dashboard for comprehensive client portfolio details and household account information, with the ability to view centralized client data as needed.

Intelligent Agents | Actionable CRM Next Steps

The Agent provides real-time insights, prompting the advisor an update may be needed on the client's profile with new goals and plans. This automation initiates opportunity and account creation, ensuring accurate updates and seamless setup.

Advanced Client Insights | Portfolio Analysis| Agents

Real-time generative AI equips advisors with instant, actionable insights during client calls, enabling proactive and strategic client engagement. Agents enhances this by seamlessly aggregating relevant news, stock updates, and analyst ratings, ensuring advisors have comprehensive, up-to-date information at their fingertips.

Accelerated Onboarding

Use of proprietary and market-leading vendors to facilitate the complex onboarding processes in Private Banking/Wealth, including application, onboarding workflows, Anti-Money Laundering (AML), Know Your Customer (KYC), and regulatory reviews.

AI Generated Pre-Call Summaries| Wrap -Up

Wealth advisors can significantly improve their preparedness by leveraging AI-generated summaries. These comprehensive insights synthesize client profiles, financial data, and strategic plans, enabling advisors to quickly grasp essential information and deliver more informed, personalized guidance. This approach streamlines the advisory process and elevates the overall client experience.

Intelligent Agents | Email Capabilities

Enhances post-meeting processes by summarizing key details, action items, and follow-up tasks. They assist in creating follow-up emails, highlighting important points, outlining next steps, and providing scheduling links.

BENEFITS

Boosts Advisor Preparedness:
Elevates the advisory experience by delivering comprehensive insights before client meetings, ensuring advisors are always well-prepared.

Efficient and Effective Follow-Ups:
Highlights key discussion points, decisions made, and action items, streamlining follow-ups for greater efficiency and effectiveness.

Timely and Relevant Updates:
Automates interactions and account creation, ensuring accurate updates and seamless servicing of client goals & plans.

Proactive Strategic Actions:
Empowers advisors to respond proactively with strategic action suggestions, significantly enhancing the quality of client interactions.

Higher Accuracy and Responsiveness:
Leverages the advanced capabilities of Anthropic's Large Language Model (LLM) for higher accuracy and responsiveness, while ensuring data security through Salesforce's trusted, secure hosted model.

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