

Salentica Data Broker™ Platform for Salesforce



registered ISV
partner

Overview

Salentica Data Broker facilitates rapid deployment of integrations to enable advisors to manage their business on the Salesforce platform and gain a 360° view of their client. Advisors using a Salesforce solution can quickly deploy Salentica's Cloud-based Data Broker by following some simple configuration instructions. This removes the need to adapt a provider's special CRM configuration or hire programmers to build custom integrations to providers' interfaces.

With Salentica Data Broker, only one package needs to be installed and maintained in a firm's CRM to be able to provide access to real-time custodian information as well as portfolio management and financial planning data that a firm relies on to service their clients. Updates to the integrations required by Salentica or the provider of the data are deployed to Salentica Data Broker, as a result, reducing the need for frequent updates to the client's CRM.

Flexible architecture built for the future

Salentica Data Exchange Service, which is part of the Salentica Data Broker Platform, provides the ability for a firm to map the data from a data source into their CRM. The Data Exchange Service eliminates the issues and conflicts created when fields are hard coded to the target CRM.

The Salentica Data Broker enhances firm password security by eliminating the need to provide and maintain login credentials for multiple 3rd parties that require access to their CRM. The Salentica Data Broker acts as a trusted platform between the client's CRM and the 3rd party data source with only one set of credentials being stored securely in the Salentica Data Broker. The Salentica Data Broker is reviewed by external data security firms to ensure it provides a trusted integration platform.

HOUSEHOLD/ENTITY	
Household Client	
Phone (416) 255-8996	Ranking Platinum
AUM \$180,989,500.00	Home 245 Park Avenue, New York, NY 10167 US
Send with DocuSign	
DETAILS RELATED	
Household/Entity Name Clarke, Tim + Joanne	Ranking Platinum
Relationship Type Household Client	AUM \$180,989,500.00
Family Clarke Family	Valuation Date 3/7/2017
Company	
Main Contacts	
Primary Contact Tim Clarke	Secondary Contact Bob Bailey
Relationship Team	
Relationship Manager Jonathan Lucas	RM Notify? ☒
Investment Advisor Bill Rourke	IM Notify? ☒

Aggregate AUM for the Entire Relationship

Salentica Data Broker Platform for:	Salesforce
Schwab OpenView Gateway®	✓
TD Ameritrade Institutional's Veo®	✓
Fidelity Wealthscape™	✓
Black Diamond® Wealth Platform	✓
Advent APX® & Axyx®	✓

Included in Salentica CRM and available for license as a standalone application

