A Turnkey Salesforce Solution For Your Hedge Fund

Over the past decade, raising funds and meeting investor requests has become more challenging. Sales & Marketing teams require a competitive advantage to attract investors and savvy consultants to invest in their funds. Your IR and Finance teams require process automation and a secure platform that ensures regulatory compliance and creates investor confidence. FinServ, with more than 15 years of industry expertise, has put together a complete solution to meet all the needs of a hedge fund.

Providing Marketing & Sales with a Competitive Advantage

FinServ provides support for prospect acquisition and automated marketing campaigns and ensures a seamless integration between Salesforce's industry leading Pardot marketing platform and the Salesforce CRM system.

We also help you take advantage of the latest Artificial Intelligence functionality (Salesforce Einstein) built right into the Salesforce platform. This enables Salesforce to notify your team when a prospect is ready to invest, which takes the guesswork out of manually combing through investor data and results in time savings. We also customize the platform help you to meet key GDPR and SEC compliance requirements.

- Customized Lead nurturing campaigns with automated Lead scoring and actions
- Integration with Preqin, FinSearches, S&P's Money Market Directories (MMD) and others
- Custom Landing Pages, Intelligent Email Templates, Automated Unssubcribe / Resubscribe
- Executive level Dashboards providing clear views of Marketing & Sales performance

A Holistic 360-degree view of the Investor

Your IR team needs a world-class user interface that makes it easy to find all investor information for your fund in one place. Whether you are pulling up investor documents, checking the latest holdings data or other previous interaction, it is imperative to get to this information as efficiently as possible, eliminating unnecessary clicks and navigation. To achieve this goal, FinServ has created a Hedge Fund skin in Salesforce that provides the following key features:

- Provide up to the minute Investor Holding Reports
- Key tax lot and other key investor breakdowns
- Instant access to all Investor correspondence including document tracking
- Management & Incentive Fee Reporting by Investor
- Cutting edge Liquidity Reporting
- Tax lot and other key investor breakdowns

Ensuring Investor and Financial Reporting are Consistent

One of the biggest challenges for funds has been the ability to ensure that the information your investor team is providing to investors matches the official books and records of the fund. The key to this crucial Compliance requirement is ensuring that all of the data is coming from a common golden source. FinServ is uniquely positioned to help your team link your Salesforce data to feeds from your internal systems and / or feeds from your Third-Party Administrator (TPA). We apply our industry expertise to get these automated feeds up and running quickly with tools to facilitate the data review and validation process.

About FinServ Consulting

FinServ Consulting is a Salesforce SI Partner with unparalleled expertise in Alternative Asset Management and provider of business consulting, systems development, and integration services. Founded in 2005, FinServ delivers customized world-class business and IT consulting services for the front, middle and back office, providing managers with optimal and first-class operating environments to support all investment styles and future asset growth.

SALESFORCE CERTIFIED
Sales Cloud Consultant

SALESFORCE CERTIFIED
Pardot Specialist

SALESFORCE CERTIFIED
Einstein Analytics and Discovery Consultant

FinServ CONSULTING

insight | vision | experience

404 Fifth Avenue, New York, NY 10018
office: (646) 603-3799

finservconsulting.com | info@finservconsulting.com