

Generate High-Quality Business Insights with Wealth Access + Salesforce Financial Services Cloud

Wealth Access for Salesforce Financial Services Cloud brings all your firm's data into one place to create the single pane of glass technology experience you've always wanted.



Deep Insights

With all your customer information together and organized, powerful stories can emerge. Uncover the kind of clear, consistent, and complete views that let you create the experiences your customers crave and your support staff needs to excel.



Complete Customer Information

The Wealth Access analytics engine rationalizes and enriches data to help you identify risks and opportunities so you can make right-timed decisions and overcome the systems and silos that hold you back.



Hyper-Personalized Experiences

Create friction-free, intuitive user journeys—for everyone. Wealth Access makes it easy to deliver a living balance sheet and frame a complete financial picture tailored to each person or company you serve.



Serious Savings

Accelerate digital experiences and fuel revenue growth by connecting business lines for efficient and personalized customer experiences, without disrupting existing systems.

Tableau and Wealth Access: Better Together

Unify all of your systems, books and records, and applications with Wealth Access, then incorporate your enriched data into Salesforce's Tableau for the ultimate business analytics.

Equip your team like never before to see the insights that lead to meaningful conversations and transform clients' financial lives.

Increase your CRM's value by gathering more data through digital client experiences that engage wealth clients as well as business and consumer banking customers.



Engagement

Give clients an engaging digital experience through your white-label Wealth Access mobile app.



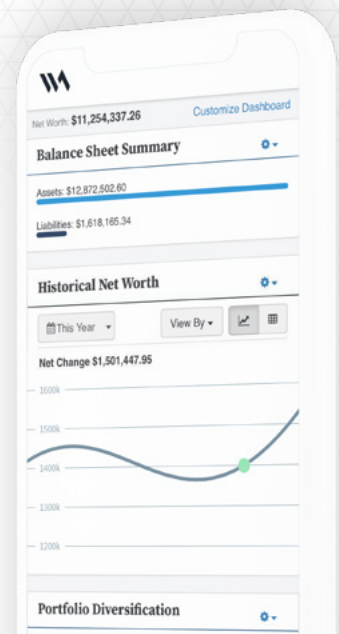
Collection

Gather additional information about a household's assets and liabilities as they fill out their own financial profile.



Enrichment

Implement business insights with Wealth Access and Tableau to drive conversations and service clients better.



About Wealth Access

Wealth Access is a customer data insights platform that enriches and unifies all of your firm's data to enable you to create hyper-personalized digital experiences.

available on
AppExchange

salesforce



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