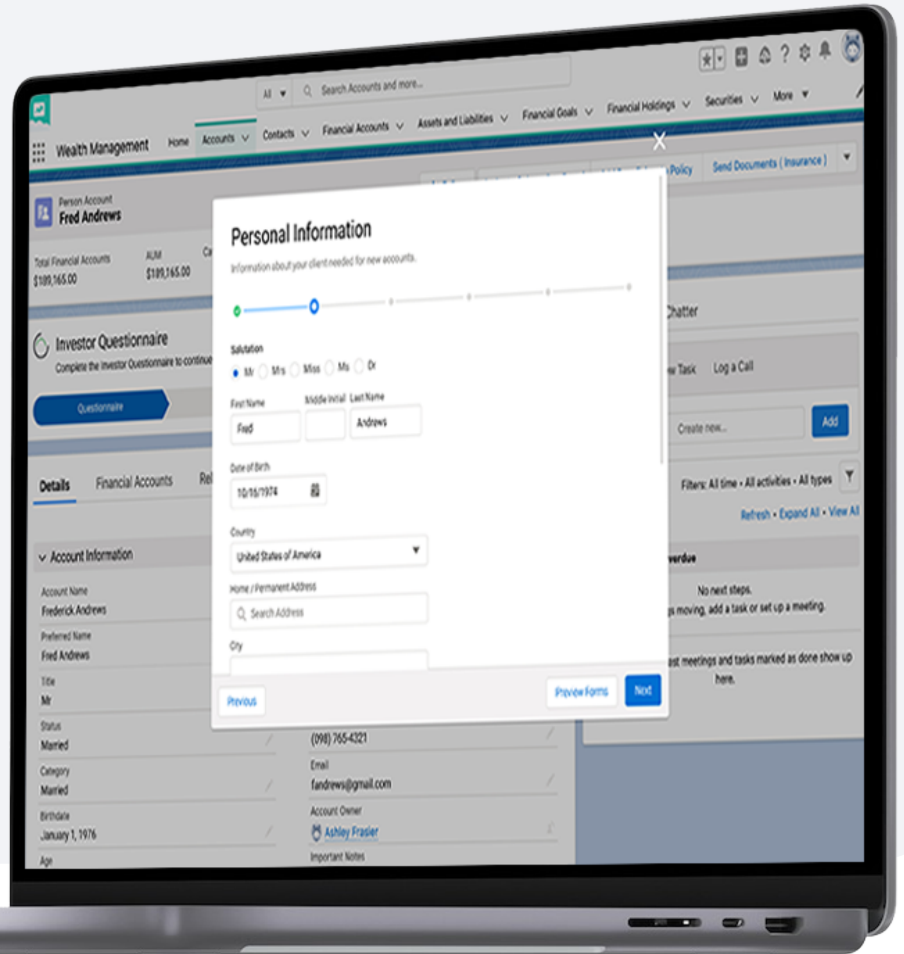
Nest Wealth

Collaborative Onboarding Where You Work.

Engage more clients & realize revenue faster with **Nest Wealth Pro for Salesforce.** Our innovative dynamic onboarding & account management experience within your CRM platform.



Advisor View

OVERVIEW

A Better Experience For Your Clients. Faster Revenue Growth For Your Firm.

Nest Wealth Technology. Your Everything Else.

Your time is your greatest asset. You differentiate yourself through the relationships you've established with your clients through financial planning, quality of service, and personal communication.

Nest Wealth Pro for Salesforce enables advisors to devote more time to their clients by enabling account opening & servicing while seamlessly integrating with your current technology.

Nest Wealth Pro for Salesforce allows you to provide better client experiences by offering the first fully collaborative onboarding process.

Now, advisors and clients can simultaneously work together on the onboarding documentation to ensure the forms are completed quickly and accurately, reducing NIGOs & getting accounts funded faster.

NORTH AMERICAN EXPERIENCE

Nest Wealth is proud to be supporting some of the big 5 banks and large wealth management firms in Canada as well as providing our expertise and innovative technology to our early adopter RIAs in the United States.

NATIONAL BANK

Scotiabank

ALIGNED capital partners inc.

Investment Planning Counsel™ FINANCIAL SOLUTIONS FOR LIFE

Better Engagement.
Faster Revenue Growth.

Increase Client Engagement

Minimize the time, effort, and resources devoted to commoditized, manual processes by leveraging a digital wealth platform that integrates with the way you do business today.

– Reduce your account opening times & errors using a fully digital onboarding process.
– Implement automated workflows that mimic your current operations.
– Minimize regulatory risk with built-in compliance roles.
– Gain daily actionable insights to improve operations with centralized data.

Improve Client Satisfaction

With a fully digital, cloud-based platform, you'll have the tools required to deliver the same user experiences clients enjoy in other areas of their life.

– Collaborate with your clients on account opening & funding forms in real-time.
– Offer your clients a fully digital investor experience with 24 / 7 access to investments & account performance.
– Monitor client actions in real-time to proactively prepare for and service their next request.
– Offer your clients the flexibility to choose their preferred communication method by expanding available channels.

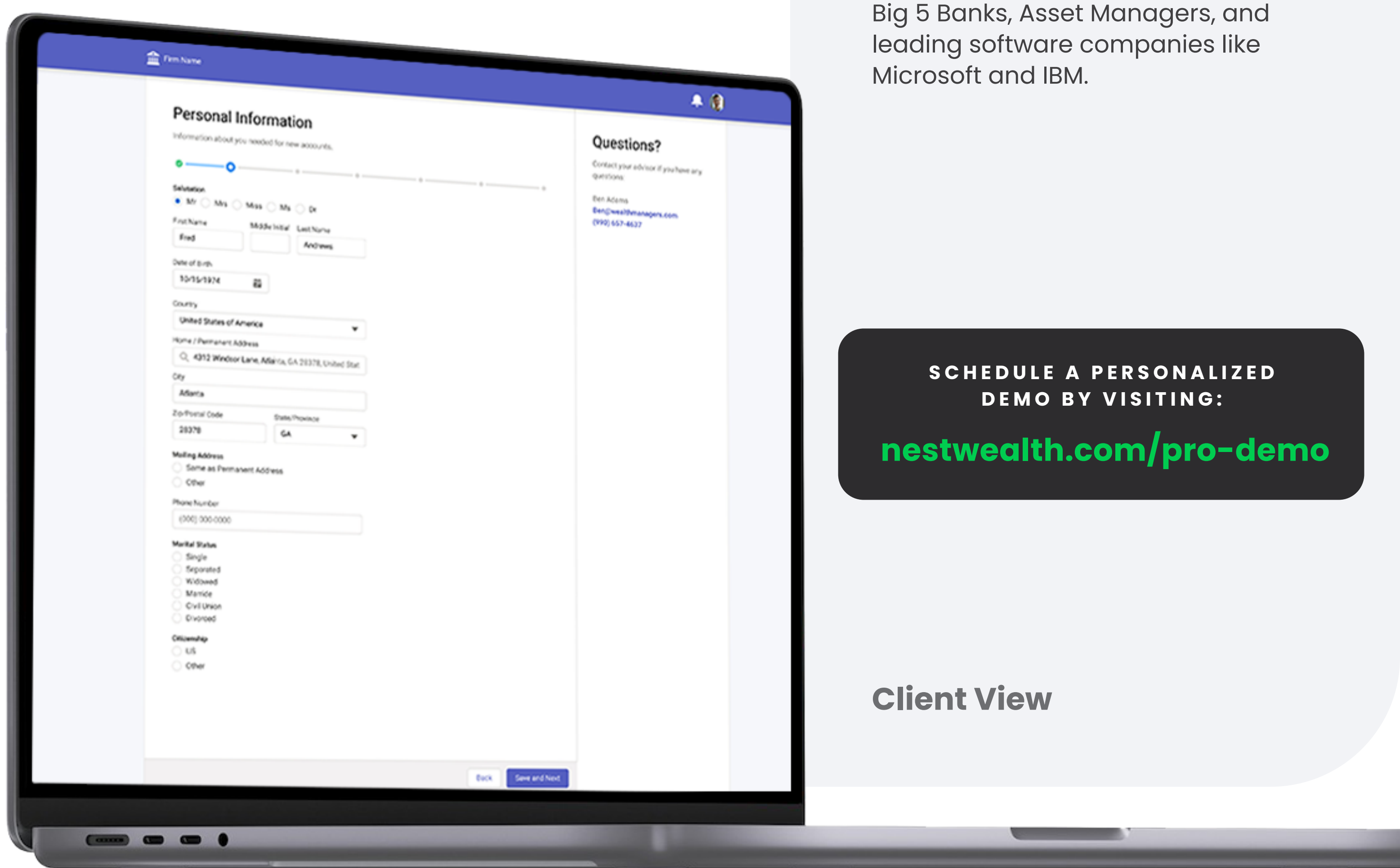
Faster Revenue Growth

Empower your firm to realize revenue faster with the operational efficiencies gained from a digital wealth onboarding solution embedded directly in your CRM, and increase advisor capacity so you can take on more business.

– Significantly reduce NIGOs.
– Streamline account opening time with fully digital onboarding that integrates with your current workflows & custodian.
– Provide more value by identifying cross and up-sell opportunities based on client activities & data.
– Monitor operations with advanced reporting tools to identify areas that need improvement & accelerate time to funding.
– Set up triggered events that nurture your clients through funding.

How It Works

Nest Wealth Pro for Salesforce is our fully collaborative wealth management solution within your CRM Software built to integrate with your existing custodian, compliance, workflows, brand, legacy systems, and third-party solutions.



Client View

About Nest Wealth

We believe all investors, regardless of location or wealth, should have access to valuable advice in the manner they choose. We are committed to delivering best-in-class investing experiences.

Nest Wealth is a leading independently owned and operated digital wealth solution provider. We are comprised of talented wealth and technology experts who have experience working at Canada's Big 5 Banks, Asset Managers, and leading software companies like Microsoft and IBM.

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nestwealth.com/pro-demo