



Struggling to thrive in this era of disruptive change in the financial services industry?



As companies embrace digital transformation strategies to stay relevant, they must also optimize their technology-driven processes for their investors.



Offering a more humanized, 1-on-1 customer experience while leveraging technology remains a challenge to be addressed and solved.

FSC Accelerator by Incloud can empower your people with the tools to build relationships and retain more clients within weeks!

Financial Service Cloud (FSC) Accelerator Includes:

- Project Setup & High-Level Business Process Review
- Person Accounts
- Financial Accounts
- Opportunities
- Leads and Referrals
- Households and Contacts
- Reporting & Data Visualization
- Train the Trainer
- Starting at \$12,000 USD and \$15,000 CAD
- Post Go-Live Support Packages Available

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With 10 years of extensive expertise in the financial services industry, Incloud understands the complex processes, pain points and day-to-day operations of financial advisors.

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Unlock the power to thrive for your people

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