

# The Future of Wealth Management

Discovering relationships and tracking new wallet share opportunities with Salesforce Financial Services Cloud

In partnership with  PLATIVE





# Automate Wealth Management Intelligence

Across Corporate America, wealth advisors and institutional money managers face challenges in identifying top prospects, and, most importantly, how to engage prospects through referrals and warm introductions. For decades, firms have attempted to sync sparse datasets and hire vendors and in-house technical experts to help tackle these challenges. Oftentimes, these efforts have been limited in their success.

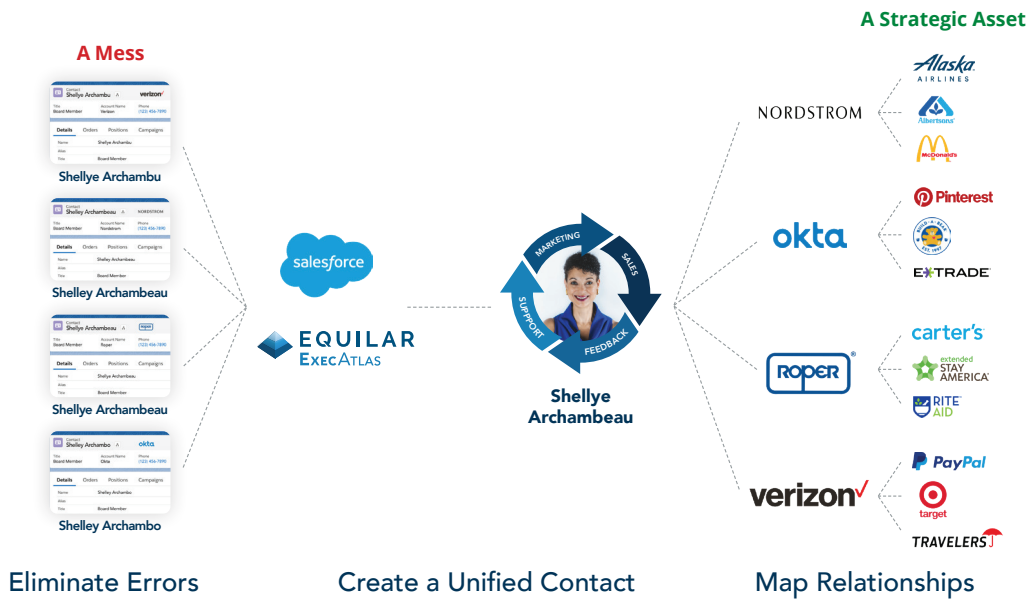
With these challenges in mind, Equilar and Plative recently announced a strategic partnership to help advisors leverage the Financial Services Cloud. The partnership focuses on providing a solution for wealth advisors by helping maintain a clean and updated CRM, providing advanced relationship mapping, and tracking historical and future vesting data.

## Get your Data in Order

CRM data can get messy very quickly. Due to outdated information and duplicate records across various

company affiliations and transitions, advisors often struggle to reach the right person at the right company. The Equilar ExecAtlas database contains the world's most connected executive network with close to 1 million data-rich profiles that include work history and wealth data for executives and board members worldwide. There are more than 96 million first- and second-degree business connections to decision makers. Offering a fully customizable CRM data sync, ExecAtlas provides executive and professional affiliation data to help users organize prospects into a unified contact record. This makes it even easier to quickly identify past communications across the organization to your target prospect. CRM data enrichment continues through customizable automated syncs, ensuring your data never grows stale.

# Transform Your Most Valuable Relationships into a Strategic Asset

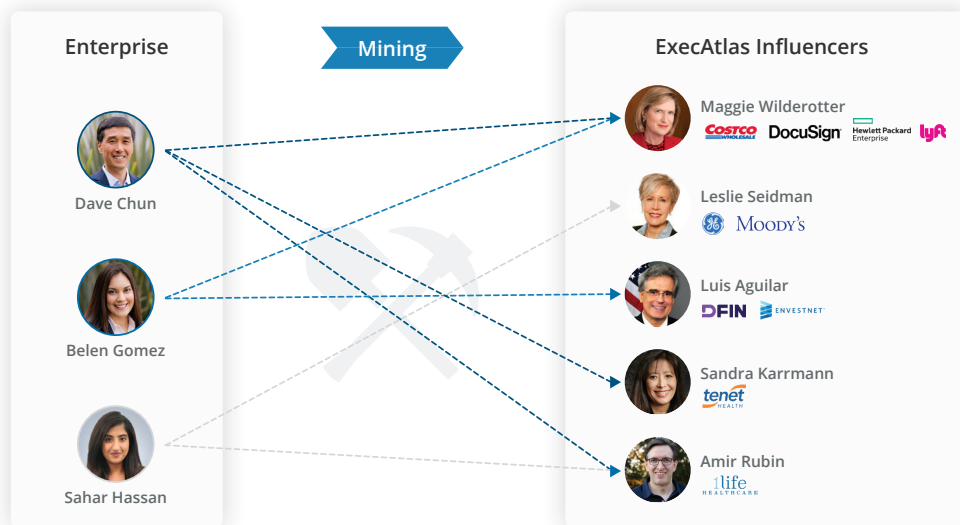


## Enterprise Relationship Management: Discovering Connections and Prospects

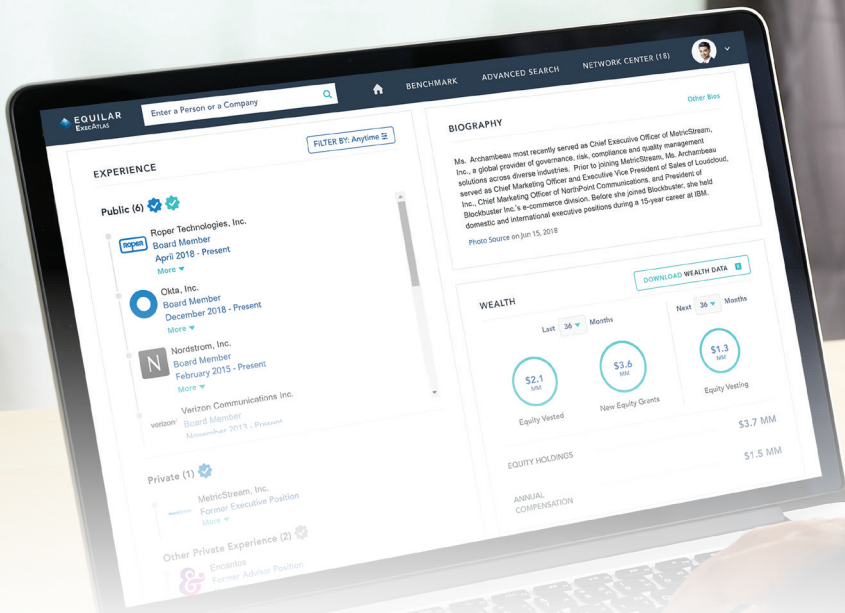
Now that you have your CRM in order, how do you get in touch with your prospects and identify new ones? Enterprise Relationship Management (ERM) is now automated and configured for your business with ExecAtlas. Our 96 million first- and second-degree connections allow you to map out your company's relationships or contact list to target prospects. Identify "who knows who" through relationship mining and historical work experience

across your organization. An IBM preference study found that cold calls are 97% ineffective with decision makers. With ERM in place, you can prioritize prospects appropriately and leverage network connections to receive warm introductions to your top prospects. Never miss new opportunities that arise from enterprise relationships with automated alerts on appointments and departures across your contacts, companies and networks.

### Mine and Map Email and Meeting Activity to Connections Across an Organization



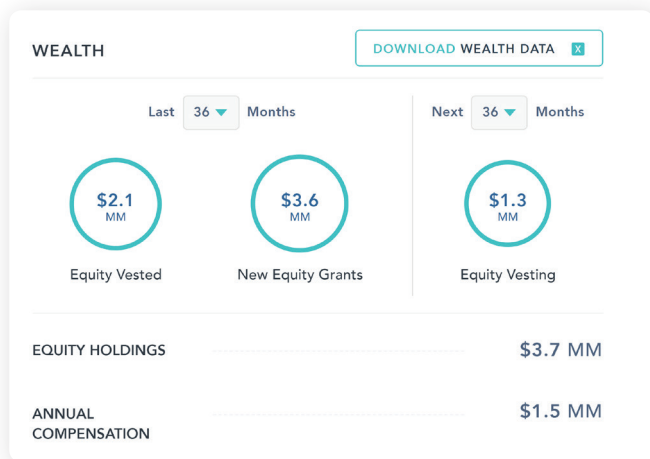




# Money in Motion ... Stay Ahead of the Competition

As part of the deep, data-rich executive and board profiles within ExecAtlas, individual wealth data and compensation details are provided based on publicly-disclosed filings. Quickly qualify new prospects and stay up to date on changes in compensation for your clients and prospects over time.

## Identify Future Vesting Instances and Equity Breakdowns



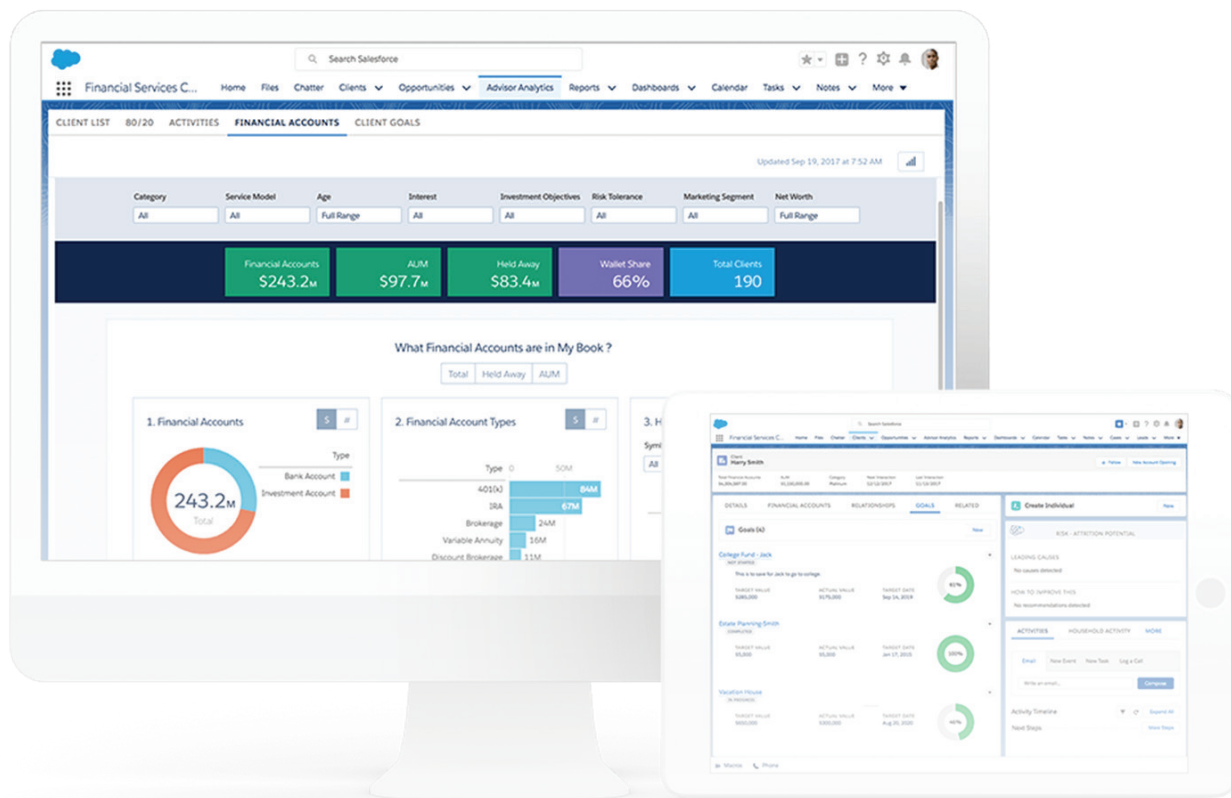
Annual and accumulated compensation figures related to an individual's executive and board positions are included separately, along with the latest information on equity holdings based on public filings.

COMPANY	ROLE	TYPE OF WEALTH	NUMBER OF SHARES	STOCK PRICE	EXERCISE PRICE	VALUE
Nordstrom, Inc.	Board Member	Stock Held	22,096	\$12.10	N/A	\$267,362
Okta, Inc.	Board Member	Stock Held	1,734	\$209.83	N/A	\$363,845
Roper Technologies, Inc.	Board Member	Stock Held	4,190	\$371.34	N/A	\$1,555,915
Verizon Communications...	Board Member	Stock Held	26,977	\$56.99	N/A	\$1,537,419
TOTAL						\$3,724,541

Equilar also captures granular award details from Form 4 filings to provide timely intelligence on new equity grants, option exercises, and upcoming vesting events related to previous awards.

Equity Vesting					CURRENT VALUE (IF UNSOLD)
DATE	COMPANY	NUMBER OF SHARES	EXERCISE PRICE	CURRENT STOCK PRICE	
					\$177,686
12/9/2020	Roper Technologies, Inc.	478	N/A	\$371.34	\$363,915
12/13/2020	Okta, Inc.	1,734	N/A	\$209.83	\$177,686
6/9/2021	Roper Technologies, Inc.	478	N/A	\$371.34	\$223,259
6/16/2021	Okta, Inc.	1,064	N/A	\$209.83	\$363,915
12/13/2021	Okta, Inc.	1,734	N/A	\$209.83	
TOTAL					\$1,306,459

Learning about new awards immediately and understanding when previous grants are becoming liquid offers unparalleled insight for wealth managers, fundraisers and Financial Services firms to help craft timely and strategic messaging to clients and high-potential prospects.



# Plative's Approach to Wealth Management Success

The team of wealth management experts at Plative work with firms ranging from small money managers to some of the world's most recognizable asset managers. We supercharge the productivity of advisors by freeing them from admin work to focus on what matters most: The needs of their clients.

Automate your most commonly run processes: Harness the power of action plans to automate new client onboarding, KYC collection, transfer of funds, and common client requests.

Build Salesforce around the needs of your clients: Using Salesforce should be a tool to arm your advisors with the intelligence surrounding why your

clients have chosen your firm over your competitors, and where you may be missing wallet share opportunities in your network. See a referral from every client and make every client a referral.

Unlock a wealth of new client opportunities: Using external datasets like Equilar, we're able to configure integrated dashboards and artificial intelligence capabilities to surface actionable insights on clients, households, and valuable business relationships.



# Are You Ready to Automate Prospect Intelligence?

With Equilar ExecAtlas, sync updated contact and company information, discover prospects, receive warm introductions and learn the right time to engage your prospects.

## Contact Us

Equilar and Plative can help you solve the unique challenges facing your team. [Contact us](#) today to learn more about custom solutions.

Visit us on the [AppExchange](#).

## About Equilar

Equilar is the leading provider of corporate leadership data solutions. Companies of all sizes rely on Equilar, including 70% of the Fortune 500 and institutional investors representing over \$20 trillion in assets. Equilar offers data-driven solutions for business development, board recruiting, executive compensation and shareholder engagement that bring together business leaders, institutional investors and advisors to drive exceptional results. The Equilar suite of solutions includes industry-leading education symposiums, comprehensive custom research services and award-winning thought leadership. Founded in 2000, Equilar is cited regularly by *Associated Press*, *Bloomberg*, *CNBC*, *The New York Times*, *The Wall Street Journal* and other leading media outlets. Learn more at [equilar.com](#).

## About Plative

Plative is a Salesforce Consulting partner with a deep bench of industry expertise in financial services. Plative has been featured as an Inc-5000 Fastest Growing Company for 2 consecutive years as well as Consulting Magazine's 26th fastest growing firm in America for 2020. Learn more at [plative.com](#).



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