

# SALESFORCE WEALTH MANAGEMENT

EMPOWERING FIRMS  
WITH INTEGRATED,  
SCALABLE SOLUTIONS



**At Sikich, we specialize in Salesforce solutions that help wealth management firms streamline operations, deepen client relationships, and scale efficiently.**

With deep industry knowledge and proven integration expertise, we connect your critical systems (portfolio management, client reporting, compliance, and more) with a unified Salesforce experience.

## WHY WEALTH MANAGEMENT FIRMS CHOOSE SIKICH



### Tailored Salesforce Integrations

Connect Salesforce with financial tools like eMoney, Black Diamond, Addepar, Orion, and Riskalyze to create a seamless 360° client view.



### Operational Efficiency

Automate workflows, eliminate data silos, and reduce manual entry to let advisors focus on delivering high-value advice.



### Enhanced Client Service

Deliver real-time, personalized reporting and faster response times with synchronized data and insights in Salesforce.



### Compliance Confidence

Stay audit-ready by integrating risk and regulatory tools to automate compliance tracking and documentation.



### Scalable Growth

Our Salesforce solutions adapt as your firm grows, accommodating new systems, data, and clients with ease.



### Full Platform Support

Managed Services can support every aspect of your Salesforce environment – from Sales & Service Cloud to Pardot & Marketing Cloud

## THE SIKICH DIFFERENCE

- ✓ More Than 4 Decades of Wealth Management Experience
- ✓ Proven Success with Leading Firms
- ✓ End-to-End Salesforce Services
- ✓ Scalable, Future-Ready Architecture
- ✓ Proven Delivery Methodology integration expertise



**PARTNER**  
SINCE 2007

## CORE SALESFORCE SERVICES FOR WEALTH MANAGEMENT

- Sales Cloud & Financial Services Cloud (FSC) Implementation & Optimization
- Portfolio, Clearing & Trading Data Integration
- Client Reporting Automation
- Data Strategy & Analytics
- Artificial Intelligence (AI) Advisory & Implementation
- Compliance & Risk Management
- Omni-Channel Marketing Automation for Client Retention & Growth
- Document Management & E-Signature
- Community Portals for Clients & Partners
- Agentic AI

## Let's Transform Your Wealth Management Business.

Contact us today to learn how Sikich can integrate Salesforce with your systems for more efficient, client-focused, and compliant operations.

 **SIKICH**®

# SALESFORCE WEALTH MANAGEMENT

## KEY PRODUCT & INDUSTRY SUCCESS

### DONALDSON CAPITAL MANAGEMENT

#### Evansville, IN

"With the Financial Services Cloud being relatively new, the Sikich team had a thorough understanding as to its capabilities, the new data model and how to customize it to support our end users' needs. You were able to build a data integration from APX that allows us to update our clients, households, financial accounts and holdings on a nightly basis so that our advisors can now work in one system to manage their clients."

### CALLAN CAPITAL

#### La Jolla, CA

"Our migration from the wealth management template to the Orion overlay of Salesforce has been successful. We were able to accomplish the following: 1) Data Migration from Salesforce's Wealth Management template of Salesforce.com to Orion's customized Salesforce.com, 2) Build out a custom Opportunity object, 3) Mail Chimp integration, 4) Survey Monkey integration, 5) User Training, 6) Admin Training, 7) Reports and Dashboard Training. We have already created some new processes around our meeting notes that are going to help efficiencies improve tenfold in the future."

### DODDS WEALTH ADVISORS

#### Jacksonville Beach, FL

"They assisted us with our implementation by coordinating and managing a Salesforce Org separation (split) into a brand new, Financial Services Cloud (FSC) environment. We were reliant on their expertise and knowledge, to build the necessary relationships for our datasets, for migrating account, contact, opportunity and activity data into Salesforce but also to assist us moving into the FSC data model and architecture. Their team took the time to listen to our needs and then translated them into a solution that addressed our unique challenges within a timely manner. Sikich is a great implementation and consulting firm for any financial services organization looking to enhance or maximize their use of Salesforce or to move to the FSC data model."

### CAPTRUST

#### Holland, MI

"Our Salesforce project included the following elements: Completed the data migration from a dissimilarly structured environment (created households where household didn't exist) and moved this data into Salesforce, Customized the FSC user interface to best accommodate Cap Trust's business processes, Created automation to update records to decease user error and reduce clicks, Implemented TaskRay for task management, Enhanced productivity/collaboration for Consultants, Client Services & Relationship Managers, Utilized workflow automation for the mitigation of errors and reduction of manual effort, Provided End User, Reports/Dashboards & Administrating Training. The Sikich team of experts provided sound recommendations in Salesforce and strives to exceed our expectations. You continued to work with our processes and requirements until we had the level of customization needed for our unique circumstances."



ADMINISTRATOR

ADVANCED  
ADMINISTRATOR

AI SPECIALIST

APPLICATION  
ARCHITECT

COMMUNITY CLOUD  
CONSULTANT

DATA ARCHITECTURE  
AND MANAGEMENT  
DESIGNER

DEVELOPMENT  
LIFECYCLE AND  
DEPLOYMENT DESIGNER

EDUCATION

NONPROFIT CLOUD  
CONSULTANT

PARDOT CONSULTANT

PARDOT SPECIALIST

PLATFORM APP  
BUILDER

PLATFORM DEVELOPER I

SALES CLOUD  
CONSULTANT

SERVICE CLOUD  
CONSULTANT

SHARING AND VISIBILITY  
DESIGNER

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