



## PROVIDING ENGAGEMENT FOR OUTCOMES WITHIN THE FINANCIAL SERVICES INDUSTRY

In this digital age, the only constant in business is change. Above all other industries, financial services has been slow to keep up. And for good reason—the sheer amount of legacy data and regulations can make the process of modernizing cumbersome. However, the success of businesses in the 21st Century hinges on the ability to meet new customer and worker expectations, which means providing them with a seamless digital experience.

Magnet360's proven process combined with our unique relationship with Salesforce makes us the perfect partner to give you competitive advantage through digital transformation. From banking to insurance, the connected customer wants to do business with you, so make it easy for them.

**Magnet360 delivers innovative solutions for the four sectors of the financial services industry:**

### 1 Wealth Management

There is a new generation of clients disrupting the wealth management industry. These clients expect personalized advice, actionable insights, and a goals-based financial plan—delivered when and where they want it. Leverage Salesforce to boost advisor productivity and build client relationships that are deeper than just numbers.

### 2 Insurance

Meet the evolving needs and expectations of today's insurance providers with the power of Salesforce. Salesforce provides the tools for insurance representatives and agents to engage in more rewarding customer conversations across any device, collaborate in online social feeds, streamline service requests, and create the world-class customer experience today's policyholders expect.

### 3 Banking

Your customers have enough chores, don't make banking one of them. Personalize your customer's experience through innovative digital solutions. Digitalize your business environment to drive back-end efficiencies, shifting the focus to the customer rather than in-house processes. A delighted customer is a loyal customer.

### 4 Capital Markets

Disparate data and out-of-date systems are tying up internal resources, burdening asset managers with maintenance rather than empowering them to sell. Modernizing systems with Salesforce provides security, efficiency, and compliance, freeing up resources, allowing closer collaboration, and enabling client centrality.

#### Financial Services Customers



#### Solution Accelerator

The Magnet360 Agent Connect Solution: The first step for insurance companies in customizing and personalizing a 360° view of the independent agent hierarchy and relationships.

#### WHY MAGNET360

At Magnet360, we live and breathe Salesforce. As a cutting-edge partner since 2004, we tap into the transformational potential of Salesforce to change the way you do business. We dedicate ourselves to understanding your business first, applying exceptional know-how to create a solution that fits your specific needs and delivers tangible results. As The Mindtree Salesforce Practice, we have access to a wealth of technological resources to push the platform even further—ensuring you get the most out of your investment. Plus, our Rockin culture attracts industry-leading top talent who are also fun to work with. It's time to Amplify Your Salesforce Possibilities.