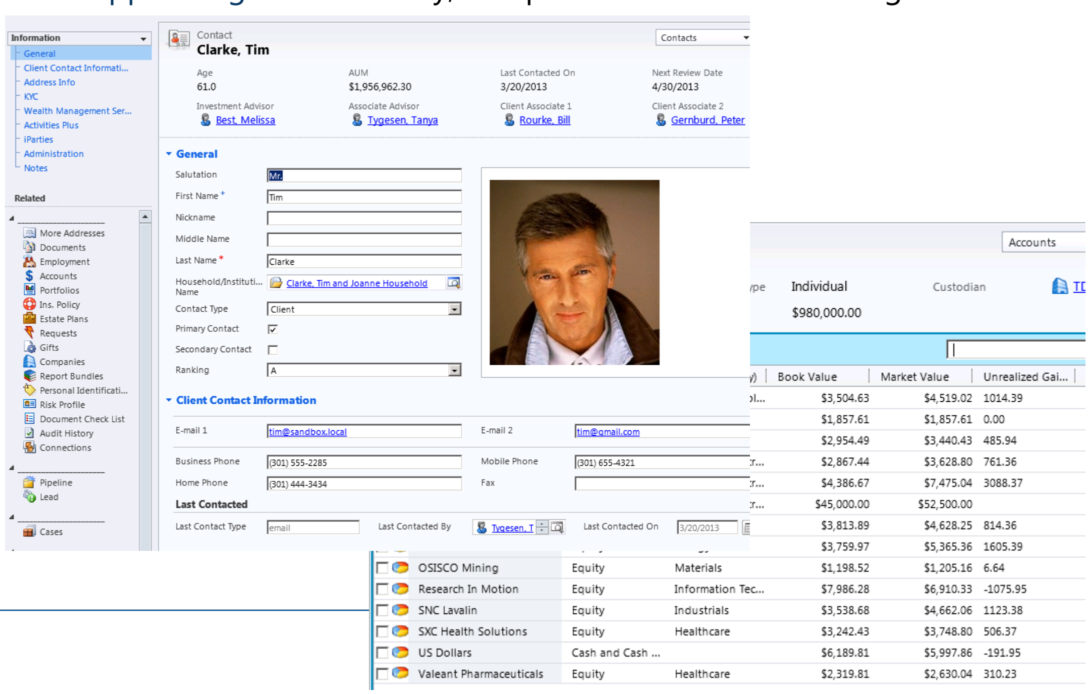
SALENTICA
CRM *for* Wealth Management™

Salentica CRM - Advisor Edition

Salentica® CRM - Advisor Edition is a comprehensive and fully customizable Customer Relationship Management (CRM) solution built on the Microsoft Dynamics® CRM foundation and integrated with Microsoft Outlook and Microsoft SharePoint.

Salentica CRM is designed exclusively for wealth management firms to address their complex client management needs through:

- Access to all important client information - personal data, financial and account data at a client and household level with full audit functionality
- iParties™ (interested parties) - complete view of all centers of influence - CPAs, portfolio managers, trustees and more
- ActivitiesPlus™ - complete view of all client touch points
- Document Management with Microsoft SharePoint - store all your client documents in one place, with security-controlled access for enhanced monitoring and compliance
- Address Manager - a tool for efficient management of client's multiple addresses
- Workflow Automation - workflows to support client onboarding, account openings and terminations, client reviews, task assignments and more
- Integration framework to Schwab PortfolioCenter®, Advent Axys®, Advent Portfolio Exchange®, in addition to seamless integration with Microsoft® Office (Outlook, Word and Excel)
- Laser App® Integration for easy, compliant custodial form filling



Benefits:

- Increased Productivity through 360° view of the client
- Increased Operational Efficiency
- Identify new prospects and business development opportunities
- Increased Marketing Efficiency
- Enhanced Oversight and Compliance
- Enriched User Experience

Features:

- Access Account Holdings & Security Master data
- Multi-Level View of Client Relationships
- Automated Workflows
- Client Segmentation
- Tracking Held Away and Physical Assets
- Document Management
- Dashboards and Reporting
- Back Office and Portfolio System Integration
- Hosted and On-Premise Deployment Options

Contact Us:

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Microsoft Partner
Gold Customer Relationship Management

What Our Clients Say

"With the legacy systems we have in place, we knew an out-of-the-box solution wouldn't meet our needs. We wanted something that would integrate well, and be delivered by people who understand our business thoroughly."

- Tom Ngo
CIO, Wetherby Asset Management

"Salentica spoke the language of our industry; its solution has features we could leverage immediately."

-$1 Billion AUM client

Salentica is a market leader in providing innovative integrated Client Relationship Management (CRM) and Document Management solutions for wealth managers and has a successful track record of over 25 years in developing and implementing financial software.

Built on the **Microsoft Dynamics® CRM** foundation, Salentica solutions seamlessly integrate with various back-office systems providing our clients with a full range of benefits offered by the powerful combination of Salentica's vertical focus on the wealth management and features- and functionality-rich Microsoft platform.

Salentica's world-class clients include Family Offices, Registered Investment Advisors, Private and Institutional Wealth Managers among which are some of the largest global banks and financial institutions.

About Us

President:	*Clients:*	*Experience:*	*Locations:*
Bill Rourke	4000+ users from RIA's, Family Offices & Wealth Managers	25+ years of wealth management focus	New York, Toronto