

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 Axyx®, 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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The screenshot displays the Salentica CRM interface for a client named Tim Clarke. The interface is divided into several sections:

- General Information:** Includes fields for Salutation (Mr), First Name (Tim), Nickname, Middle Name, Last Name (Clarke), Household/Institution Name (Clarke, Tim and Joanne Household), Contact Type (Client), Primary Contact (checked), Secondary Contact, and Ranking (A).
- Client Contact Information:** Lists email addresses (tim@sandbox.local, tim@gmail.com), Business Phone ((301) 555-2285), Mobile Phone ((301) 655-4321), Home Phone ((301) 444-3434), and Fax.
- Last Contacted:** Shows the last contact type (email), last contacted by (Tygesen, T), and last contacted on (3/20/2013).
- Accounts Table:** A table showing account details with columns for Book Value, Market Value, and Unrealized Gain/Loss.

Type	Book Value	Market Value	Unrealized Gain/Loss
Individual	\$980,000.00		
...	\$3,504.63	\$4,519.02	1014.39
...	\$1,857.61	\$1,857.61	0.00
...	\$2,954.49	\$3,440.43	485.94
...	\$2,867.44	\$3,628.80	761.36
...	\$4,386.67	\$7,475.04	3088.37
...	\$45,000.00	\$52,500.00	
...	\$3,813.89	\$4,628.25	814.36
...	\$3,759.97	\$5,365.36	1605.39
...	\$1,198.52	\$1,205.16	6.64
...	\$7,986.28	\$6,910.33	-1075.95
...	\$3,538.68	\$4,662.06	1123.38
...	\$3,242.43	\$3,748.80	506.37
...	\$6,189.81	\$5,997.86	-191.95
...	\$2,319.81	\$2,630.04	310.23

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:
Bill Rourke

Clients:
4000+ users from RIA's,
Family Offices & Wealth Managers

Experience:
25+ years of wealth
management focus

Locations:
New York, Toronto