

## THE VALUE OF INTEGRATION FOR INVESTMENT ADVISORS

As the speed of business accelerates in today's markets, clients expect their advisors to instantly dissect and deliver relevant information concerning their investments. But with the use of multiple and disparate systems, the provision of such an outstanding client experience can be a complex challenge, one that draws resources away from business development activities.

To address this challenge, advisors are turning to technology solutions. By taking advantage of cross system integration, advisors can eliminate or, at the very least, dramatically reduce the number of systems required to efficiently and effectively manage their business while delivering the superior service their clients expect.

One of these technology solutions is Salentica Advisor Desk, a Customer Relationship Management (CRM) solution that serves as a foundation for realizing a promising new concept: a fully integrated desktop for advisors and wealth managers.

The objective is to give advisors instant access to real-time custody data, seamlessly flowing directly from custodian systems into the CRM. This can now be easily accomplished through solutions like Schwab OpenView Gateway™. Integrating custodian data and enabling it to be accessible in the CRM provides advisors with a complete real-time view of clients' financial information including holdings, transactions, account profiles and alerts. In addition, the features that CRM systems already provide to their users – all touch points, preferences and centers of influence surrounding clients – can also be viewed, and within context.

During times of market news that affect client holdings, advisors need the ability to respond to client queries with accurate, timely and detailed information about impact and exposure. With the CRM acting as an information hub, custodian alerts such as corporate actions can be viewed directly within the CRM the moment they are generated, so that follow-up tasks or emails can be immediately created with a couple of mouse clicks.

Integration of disparate systems to the CRM significantly improves response time to clients, eliminates double entries and streamlines processes for greater efficiency. This results in time savings so that advisors can dedicate more time to meeting with clients and building their business.

*"We are committed to using integrated technology in our business. I am a private pilot and know that using integrated technology when flying reduces risk to my passengers and provides an opportunity to make real time, informed decisions that would simply not be possible without the integration of numerous sources of information using technology. This same paradigm applies to our business – integrating the various different technology components allows us to make better decisions, increase our profitability and better serve our clients."*

ROGER SHARP  
ROGER L. SHARP & ASSOCIATES, LLC  
A REGISTERED INVESTMENT ADVISOR  
FAMILY WEALTH CONSULTANTS

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### SALENTICA INC.

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

Salentica is the first Microsoft Independent Software Vendor (ISV) selected to participate in the Schwab OpenView Gateway™.

Built on the **Microsoft Dynamics® CRM** foundation, Salentica solutions provide clients with a full range of benefits through the powerful combination of Salentica's vertical focus on wealth management and the features- and functionality- rich Microsoft platform.

**For more information please contact us at**

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