Salentica® CRM Advisor Edition on Microsoft CRM

SCHWAB INTELLIGENT TECHNOLOGIES™

Salentica® CRM Advisor Edition is a configurable CRM solution powered by Microsoft Dynamics CRM and designed specifically for wealth managers to support your client management and business development needs.

Salentica CRM is integrated to Schwab OpenView Gateway® for real time and CRM actionable data from Schwab Advisor Center®.

We also have a number of other integrations including TD Ameritrade Institutional's Veo®, Advent APX®, Axys® & Black Diamond®, Envestnet | Tamarac®, Orion Connect and Laser App®.

Salentica CRM is fully configurable allowing your CRM to grow as your business grows.

Schwab Custodian Integration

Secure Daily Updates and Real Time Account data from Schwab Advisor Center® provided inside Salentica CRM.

Other Integration Solutions

Other integrations include TD Ameritrade Institutional's Veo®, Advent APX®, Axys® & Black Diamond®, Envestnet | Tamarac® and Orion Connect.

Track Your Client 360°

Activity tracking with Microsoft Outlook, Document Management with Microsoft SharePoint, Dashboards, Families, Households, Contacts, Accounts, Portfolios, Holdings, Activities, Request Tracking, Multiple Addresses, Interested Parties and COIs, Referral Sources and more.

Powerful Wealth Management Solution & Workflow Automation

Salentica CRM provides a prebuilt wealth management CRM Solution that has all the ingredients your firm needs to be successful. Workflow automation helps firms to increase efficiencies and improve client service.

Custodial Form Filling

Laser App's accurate custodial form filling using your CRM data to reduce NIGO errors and increase accuracy. Combine with electronic signatures to increase straight through processing efficiency.

Business Development

Track and report on your new client pipeline and ongoing client business development in Salentica CRM.

Mobility

Anytime, anywhere access using Salentica CRM for Microsoft CRM on tablets & phones.

Professional Services

Support:	**Customization:**	**Training:**	**Data Migration:**
Front line support partner for your firm	Custom development for reports, integrations and more	Administrator and End User Training	Act!, Microsoft Dynamics CRM, Salesforce, Junxure, Goldmine, Outlook, Excel, Redtail and many more

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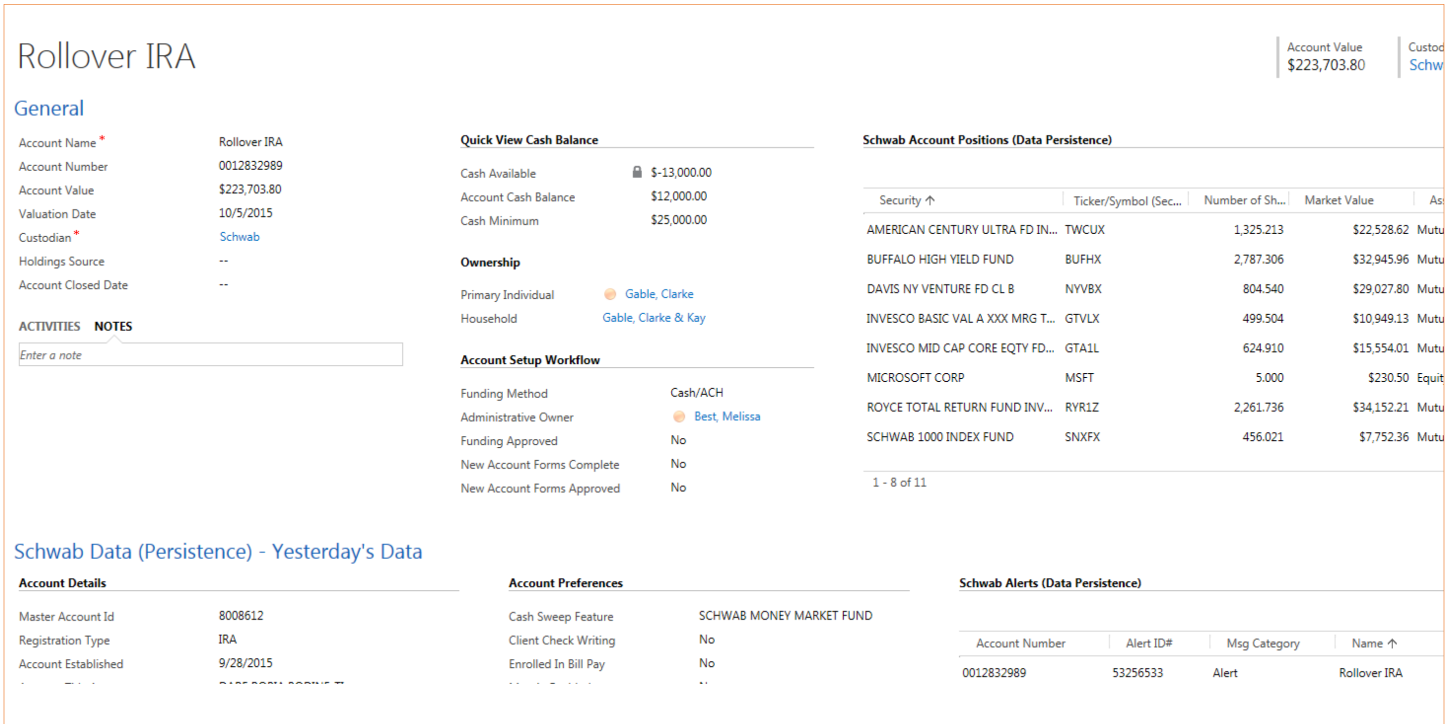

Actionable Account data from Schwab Advisor Center®

ABOUT SALENTICA

Salentica is a market leader providing innovative, integrated Client Relationship Management (CRM) and Document Management solutions for wealth managers on both Microsoft Dynamics CRM and Salesforce CRM platforms. With over 5000 users today, we have a successful track record of over 25 years in developing and implementing financial software.

Salentica's industry leading clients include Registered Investment Advisors, Broker Dealers, Family Offices, Private and Institutional Wealth Managers, Trust Companies and Private Banks.

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