Intelligent experience with Salesforce Financial Services Cloud offering

The wealth management industry is undergoing significant paradigm shifts. There is a new generation of investors whose expectations and preferences are driven by new technologies and experiences from the last financial crisis. Traditional delivery models may soon become history as firms of all stripes broaden their offerings and target client and adviser segments. The competition will be tough.

The Wealth Management (WM) industry is under considerable stress amidst the combined forces of demographics, technology, regulations, and competition

The great wealth transfer

Baby Boomers, are expected to transfer more than $68 trillion in wealth to younger generations

Democratizationof services

Retail investors are increasingly expecting the same access to digital services as wealthier, and accredited investors

Money in motion

On an average 12% of all affluent clients' investable assets move on an annual basis and 7% of those assets moved directly between institutions

Plethora of distributors

More distribution channels, few winners with clients demanding more personalized service and advisory aligned to their changing financial goals

New offerings

Digital assets investments and impact investing is on the rise and RMs/RIAs need to be equipped with relevant solutions

Disruptive tech

Leveraging the benefits of cloud computing, AI and the need to move to nimbler solutions that offer business benefits

' Netflixing of advice' — Future of wealth management

Total global wealth: $350 trillion

Global wealth grew at 15% in 2020-21

High networth : 56 MM, $192 T

Mass affluent : 583 MM, $164 T

71% of clients expect more from their financial advisors

Lack of customized investment advice

Inability to explain investment decisions and rationale

Advice without supporting material

By 2030, 80% of clients*

Want to access advice in a Netflix-style model

Data-driven, hyper-personalized, continuous

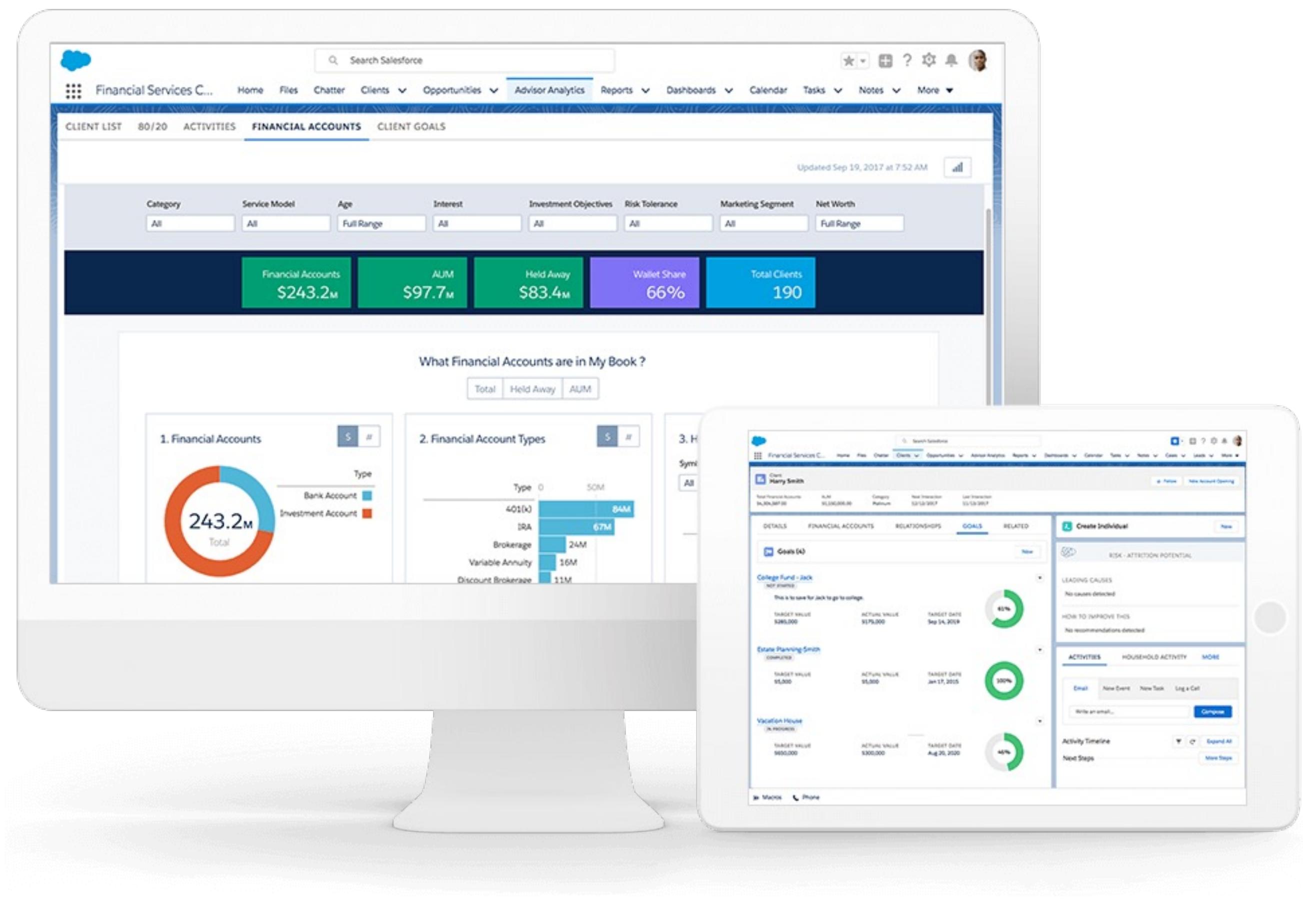
By subscription

Source: McKinsey report

Virtusa helps financial advisors supercharge their productivity and focus on client needs with Salesforce's financial wealth management offering. We help them stay ahead of changing expectations through personalized interactions with rich client profiles, powerful productivity pre-built AI tools and algorithms, integrated partner apps, and proactive tracking for better insights.

Key features of financial services cloud for wealth management

- Real-time capture, retrieval, and analysis of client and investment data
- Drag-and-drop customizable app-builder to fit the way your wealth management team works
- Pre-built integration connectors with common fintech and investment tracking solution
- Highly scalable, secure, and compliant software as a service (SaaS) cloud-based solution
- Highly extensible with the power of the Salesforce platform and ecosystem (self-service portals/mobile app, marketing automation, call center, AppExchange, etc.)
- Pre-built AI capabilities, including analytics, predicative, and generative on Einstein



Why clients are choosing Virtusa?

We have all the key ingredients to success:

- **Pioneering the summit** – Virtusa is recognized as a global top 20 partner of Salesforce with extensive capability across all major clouds.
- **Industry recognition** - Recognized as an enterprise innovator in the HFS Horizons Best Service Providers in Asset and Wealth Management 2024
- **Domain-first team** – more than 830 wealth and asset management associates and more than 180 Subject Matter Experts (SMEs) with deep domain knowledge

Success stories

- Developed Salesforce financial services cloud solution that enabled a global bank to provide its clients with real-time financial accounts and positions data from global trading platform.
- Created a custom advisor dashboard for distribution efficiency, providing a 360-degree view of client data in one place along with deep insights on clients, market, RM Performance, and team performance.

Contact us at **marketing@virtusa.com** to speak with an expert today.

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