



Salentica® Elements™

On the Salesforce® Lightning Platform

Salentica Elements is a turnkey, yet configurable solution built on the Salesforce Lightning Platform. This solution is designed specifically for the unique needs of RIAs and wealth managers to deepen client relationships and grow their business with scale.

SS&C Salentica has more than 20 years of experience providing Client Relationship Management (CRM) solutions for wealth management firms. We provide best practices based on our deep domain knowledge to help our clients achieve success through reduced operational risks and efficient processes.



* Please note, these integrations and more are available through separate applications from the Salesforce AppExchange and may be subject to additional fees. Available integrations must be Lightning compatible, please consult with the app provider to ensure compatibility with Salentica Elements.

Robust wealth management solution

Salentica Elements provides a pre-built configuration on the Salesforce Lightning Platform and is tailored for wealth management firms. Wealth management-specific entities and features have been added and unused entities and screens are hidden away. You can start using Salentica Elements right away to manage your client relationships as well as your business development pipeline.

Cloud-based freedom: Salentica Elements is a cloud-only platform – no IT department required. Additionally, you benefit from Salesforce’s continual Research & Development – many of the capabilities that Salesforce releases will be available – such as the Salesforce1 mobile app for smartphones and tablets.

Connected: Enhance Salentica Elements’ wealth management capabilities by connecting it to your other critical applications. Elements was developed in conjunction with the Salentica Data Broker™, which connects CRM systems with other core financial services apps. Integration with portfolio management platforms and real-time custodial feeds are available.

Harness the power of lightning modern design: Salentica Elements is built on Salesforce’s revolutionary Lightning UI framework. This modern, responsive UI allows users to tailor their experience to how they prefer to work.

Make it your own: Nobody knows how your business works better than you do. Salentica Elements has been designed to be flexible for this reason. Firms can customize Elements by creating their own unique fields, reports, dashboards, home pages, and workflows.

Ongoing enhancement and investment: Both the Salesforce platform and Salentica Elements are continually being enhanced. As new features are released, existing clients can adopt current packages in order to take advantage of the most recent capabilities.

Service and support: A number of features are included in the monthly Salentica Elements fee. Elements, clients will have access to new product releases and support collateral, including client exclusive training and videos. Clients will also have the ability to receive product support through the Elements Help Desk and have access to articles and FAQs.

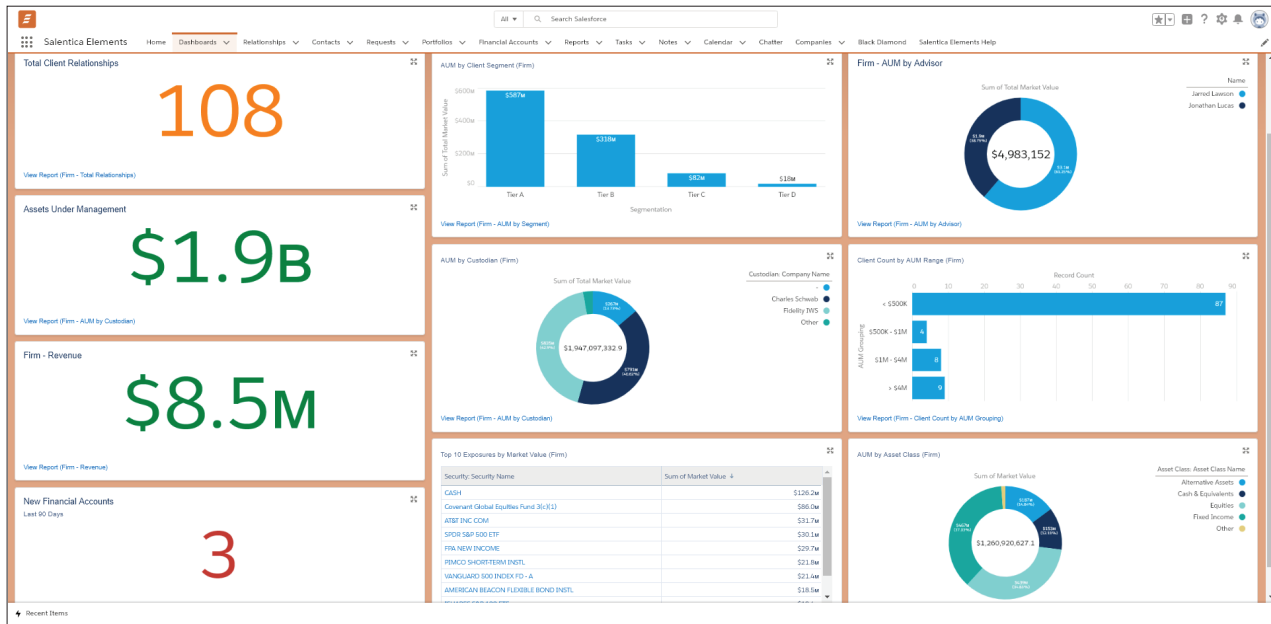
Workflows made easy: Partnering with Conga® Orchestrate, Salentica Elements includes a package of preconfigured workflows to streamline daily tasks and increase operational efficiency.

Further information:

- Available on Salesforce AppExchange, the world’s leading business apps marketplace.
- Quick-start deployment with data loaded using predefined. Excel templates for Relationships, Contacts, Portfolios and Investment Accounts.

To learn more about Salentica Elements, talk to your SS&C Salentica representative or email info@salentica.com.

Visit the AppExchange to see screenshots, customer reviews, and more.



Dashboard showing a firm-wide overview of client assets and pipeline status