## SS&C Salentica

## Salentica Data Broker<sup>™</sup> Platform for Salesforce





## Overview

Salentica Data Broker facilitates rapid deployment of integrations to enable advisors to manage their business on the Salesforce platform and gain a 360° view of their client. Advisors using a Salesforce solution can quickly deploy Salentica's Cloud-based Data Broker by following some simple configuration instructions. This removes the need to adapt a provider's special CRM configuration or hire programmers to build custom integrations to providers' interfaces.

With Salentica Data Broker, only one package needs to be installed and maintained in a firm's CRM to be able to provide access to real-time custodian information as well as portfolio management and financial planning data that a firm relies on to service their clients. Updates to the integrations required by Salentica or the provider of the data are deployed to Salentica Data Broker, as a result, reducing the need for frequent updates to the client's CRM.

## Flexible architecture built for the future

Salentica Data Exchange Service, which is part of the Salentica Data Broker Platform, provides the ability for a firm to map the data from a data source into their CRM. The Data Exchange Service eliminates the issues and conflicts created when fields are hard coded to the target CRM.

The Salentica Data Broker enhances firm password security by eliminating the need to provide and maintain login credentials for multiple 3rd parties that require access to their CRM. The Salentica Data Broker acts as a trusted platform between the client's CRM and the 3rd party data source with only one set of credentials being stored securely in the Salentica Data Broker. The Salentica Data Broker is reviewed by external data security firms to ensure it provides a trusted integration platform.

			Q, Search Salesforce	
Lightning	Home Tasks 🗸 Calendar Rami	iles 🗸 Households/Entities	✓ Contacts ✓ Requests ✓ Portfolios ✓ Investment	it Accounts 🗸 Holdings
HOUSEHOLD/E Household	d Client			
Phone (416) 255-8996	Ranking AUM Platinum \$180,989,500.00	Home 245 Park Avenue, New York, NY 10167 US		
Send with DocuSign				
DETAILS R	RELATED			
Household/Entity Name			Ranking	
Clarke, Tim + Joanne			Platinum	
Relationship Type			AUM	
Household Client			\$180,989,500.00	
Family			Valuation Date	
Clarke Family			3/7/2017	
Company				
✓ Main Contacts				
Primary Contact			Secondary Contact	
Tim Clarke			Bob Balley	
✓ Relationship Te	eam			
Relationship Manager			RM Notify?	
🙆 Jonathan Lucas			V	
Investment Advisor			IM Notify?	
Bill Rourke				

Aggregate AUM for the Entire Relationship



Salentica Data Broker Platform for:	Salesforce	
Schwab OpenView Gateway®	✓	
TD Ameritrade Institutional's Veo®	✓	
Fidelity Wealthscape <sup>sm</sup>	✓	
Black Diamond® Wealth Platform	✓	
Advent APX® & Axys®	✓	
Salentica Data		
Secure, Trusted, Flexible Real-time Dat Salentica Data Connection Service <sup>™</sup> Prebuilt data connections allowing for real-time, view-only visualizations of data from leading custodians.	Salentica Data Exchange Service <sup>™</sup> Flexible, metadata-driven data movement from integration source to target. Adaptable to any CRM deployment with user-defined data maps.	
Real-time Custodial Integrations	Portfolio Management Integrations	

