

Financial Services

Agentic AI for Hyper-personalized Wealth Advisory with Salesforce

Flyer



As a wealth advisor, your greatest value comes from building trust through personalized experiences and meaningful, empathetic conversations. Yet, while 77% of clients say more frequent and tailored communication would boost their confidence in their advisor ([YCharts survey](#)), nearly 60% of an advisor's time is spent on tasks unrelated to client service or meetings ([FUSE Research Network report](#)). Additionally, almost two-thirds of industry professionals report that current technology falls short, with automation not advancing quickly enough to support their needs ([Avaloq wealth insights](#)).

Now, what if you could change this? Imagine leveraging agentic AI on Salesforce's robust financial services cloud (FSC) to strengthen client relationships and deliver exceptional, human-centered service at scale.

Hexaware's Agentic AI-powered Solution for Wealth Advisors

Hexaware AgentVerse for Financial Services—Investment Guidance, an agentic AI solution, built on Salesforce's Agentforce platform, re-imagines wealth advisors' workflows to enhance client engagement. By autonomously analyzing vast arrays of data, the system identifies key impact areas to deliver real-time personalized insights, actionable recommendations, and context-rich communications, ensuring advisors are equipped with all necessary information to engage clients effectively and proactively.

Benefits

Potential benefits of enabling agentic AI for wealth advisory:



4X increase in frequency of personalized client communication



Up to 80% reduction in time spent on administrative activities



Up to 60% reduction in time spent on portfolio management



Up to 50% improvement in efficacy of client meetings



Real-time capabilities create additional touchpoints



Ease of integration with existing systems and APIs



Improved client retention

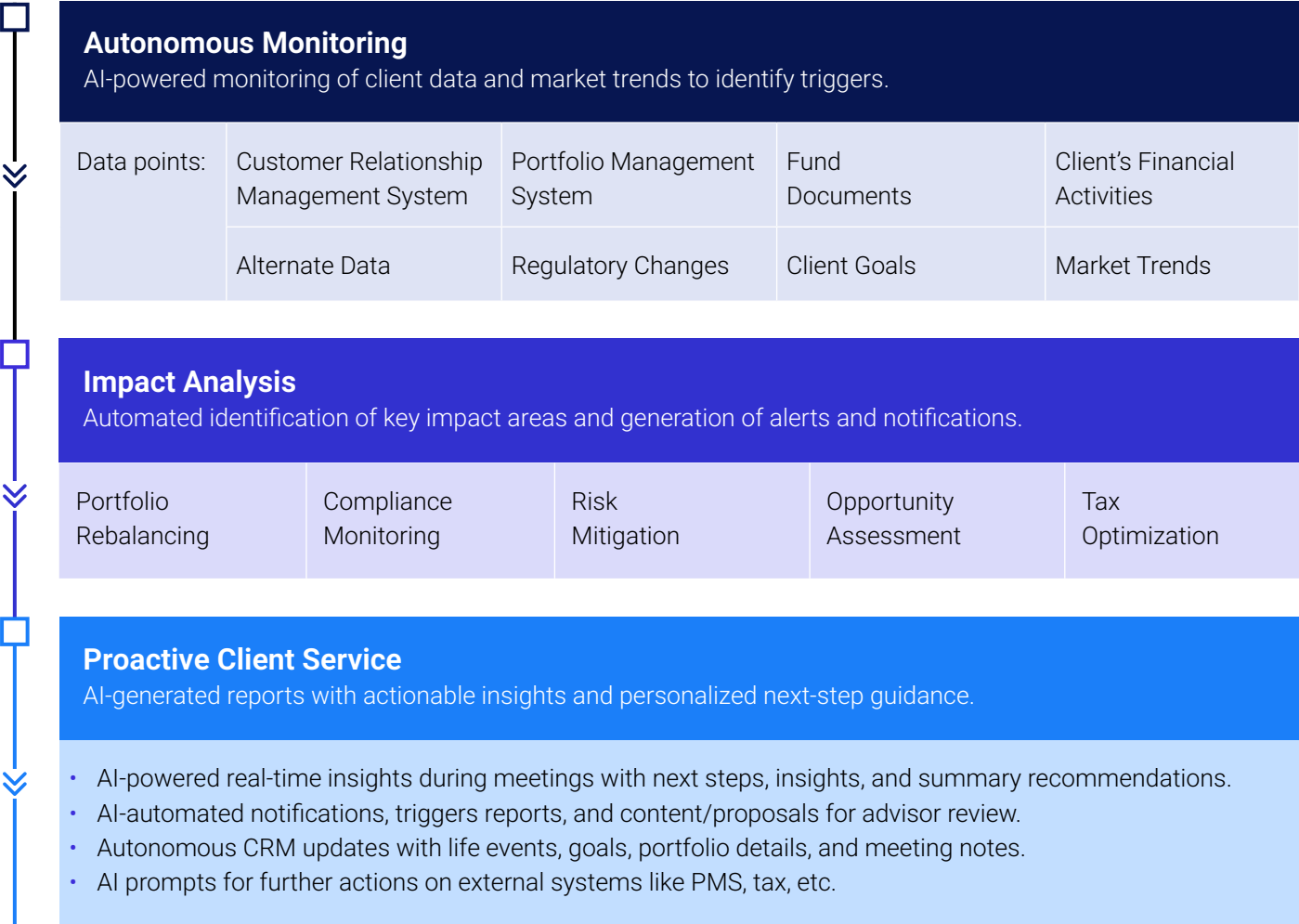


Automated compliance and reporting



More time for strategic engagement

Here's how it works:



Seamless Integration Across Systems:

Integrates effortlessly with planning tools, portfolio systems, and tax software to ensure connectivity and operational efficiency.



Unification of Data for Holistic Insights:

Combines data from multiple systems for a unified view of client portfolios, market trends, and financial activities for smarter decisions and proactive service.



Reimagine wealth advisory with Hexaware's agentic AI solutions on Salesforce. Unlock a smarter, faster, and more personalized way to serve your clients.

Ready to see agentic AI for wealth advisory in action? Contact us at marketing@hexaware.com or scan the QR code to schedule a demo today.

About Hexaware

Hexaware is a global technology and business process services company. Every day, Hexawarians wake up with a singular purpose: to create smiles through great people and technology. With this purpose gaining momentum, we are well on our way to realizing our vision of being the most loved digital transformation partner in the world. We also seek to protect the planet and build a better tomorrow for our customers, employees, partners, investors, and the communities in which we operate.

With offices across the world, we empower enterprises to realize digital transformation at scale and speed by partnering with them to build, transform, run, and optimize their technology and business processes.