FINS Agents

- Select **1** of the following FINS Agent use cases*
- Agent is connected to Salesforce org data
- Prompts, Flows & Actions created to support Use case
- **6 Week** Agent rollout

Automated Document Requests

Onboarding Tracker

Automated Performance Reports

Client Profiler Agent

Automated Financial Proposals

** Data Cloud Use Cases Available Upon Request*

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FINS Agent Use Cases

Automated Document Requests

Sends customized requests to clients for required documents, including onboarding forms, financial records, and compliance documents.

Onboarding Tracker

Provides advisors with real-time status updates on each client's onboarding process, identifying any missing information.

Automated Performance Reports

Regularly generates portfolio performance summaries, highlighting key metrics and any underperforming assets.

Client Profiler Agent

Pulls relevant data from Salesforce, including interactions, financial history, and preferences, to generate comprehensive client profiles.

Automated Financial Proposals

Uses historical client data and financial goals to generate tailored proposals for insurance policies, investment strategies, and financial plans.

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