Attract, retain, and grow trusted adviser-client relationships

Gold
Microsoft Partner
Microsoft

Available on
Microsoft AppSource

Crowe Wealth Management for Microsoft Dynamics 365™

To remain competitive and excel in an increasingly difficult financial advisory sector, wealth management firms need to streamline processes, increase adviser and client collaboration, and provide a single, centralized view of client-related information. Crowe Wealth Management for Microsoft Dynamics 365 can improve your clients' experiences, increase adviser productivity, and provide effective ways to analyze your business and client needs.

Personalize your client relationships

Client and household profiles bring everything together into single view helping make your interactions relevant and tailored to your clients' needs and objectives.

Easy to use

Built on the Microsoft Dynamics 365 platform, Crowe Wealth Management is an easy-to-use relationship management solution deeply integrated with Microsoft Office 365™ software.

Increase profitability

Empower advisers with insights to personalize relationships, predict customer needs, and increase sales – allowing you to turn relationships into revenue.

Boost productivity

Apply business process workflows to automate, standardize, and guide advisers through defined business processes that can provide consistency and increase efficiency.

Simple, flexible, and easy to deploy

Hit the ground running with an industry-leading, cloud-based solution integrated with software that's already familiar to advisers. This speeds up new-user onboarding, creating fast user adoption and lower training costs.

Benefits							
Seamless integration into the Microsoft Dynamics 365 platform	Reduce the administrative overhead needed to look for information	Track current and past client activities to discover client opportunities	Segment and understand current household financial capacity and potential	Get started quickly with an intuitive design and functionality	Easy configuration and smooth integration with Microsoft Office and Outlook software	Track referrals and manage the impact they have on your book of business	Flexible security model to support individual, team, and role-based security needs

Learn more

For more information on Crowe Wealth Management for Microsoft Dynamics 365, visit crowe.com/crm or contact:

Ryan Plourde
+1 508 475 7951
ryan.plourde@crowe.com

PERF-19004-009A