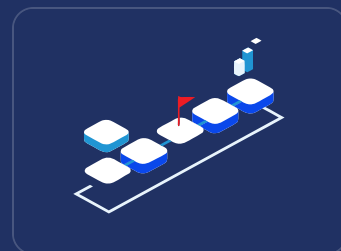


SALESFORCE · FINANCIAL SERVICES CLOUD · FOUNDATION

Financial Services Cloud Foundation

The FSC data model done right: households, relationships, financial accounts, an onboarding process with action plans and compliant data sharing, for up to 35 advisors.



PRICE

From \$22,000

TIMELINE

4-6 weeks

SIZED FOR

Up to 35 advisors or bankers

WHAT'S INCLUDED

- Up to 35 advisors or bankers
- FSC data model (person accounts, households, relationship groups, financial accounts, financial goals)
- Actionable Relationship Center on 2 record pages
- 1 client onboarding process with action plans (3 templates)
- Compliant data sharing for 1 role hierarchy
- Field history and field audit trail on up to 20 fields
- 10 reports and 2 dashboards
- Migration of up to 25,000 records from 1 source
- 3 trainings (admin, advisors, operations)

NOT INCLUDED

- Custodial, core-banking or policy-admin integrations and data feeds
- Agentforce
- Shield setup
- Insurance policy or loan origination objects beyond core FSC
- Experience Cloud

You provide

- Household and relationship rules
- Source data export
- Compliance requirements for data sharing

Assumptions

- FSC licenses in place
- Person accounts enabled or approved for enabling

Done means: Households and relationships display correctly for a sample of 25 clients signed off by the client; onboarding process runs end to end.

COMMON QUESTIONS

How much does a Financial Services Cloud implementation cost? Foundation starts at \$22,000 for up to 35 advisors and takes 4 to 6 weeks. Growth, for 35 to 100 users with more processes, an Agentforce agent and Shield, starts at \$48,000. Firms with 1 to 10 advisors can use the Small-RIA FSC edition at \$15,000.

Does Foundation include our custodian feed? No. Custodial and core-banking integrations are a separate add-on from \$12,000 per custodian, using the vendor's connector, so you only pay for the feeds you need.

Standard on every package. Every Launch package includes a named senior consultant from kickoff to go-live, a written project plan, weekly status, build and test in a sandbox where the platform has one, one UAT cycle, admin documentation, recorded training and 30 days of hypercare. Never included: software licenses, custom code unless listed, integrations not named, content beyond the numbers listed, legal or compliance approval, on-site work and travel.



Talk to a senior consultant

vantagepoint.io/packages/salesforce-financial-services-cloud-foundation

Book a free 30-minute CRM assessment: vantagepoint.io/get-started

Full scope, FAQs and the latest price are on the package page.