PRODUCT OVERVIEW

NATIVE SALESFORCE AI FOR WEALTH MANAGEMENT OPERATIONS

ArcusX AI™ brings Salesforce-native intelligence to wealth management operations. It combines firm-approved data, document intelligence, adaptive multi-model routing and supervised automation to summarize context, surface risk, draft follow-up and stage actions for review. Configurable human oversight and a complete audit trail help firms improve productivity while maintaining control, accountability and compliance readiness.

ArcusX AI™

NATIVE SALESFORCE AI

ArcusX AI™ turns data already captured in Salesforce, documents, workflows, and institutional systems into practical, governed intelligence for wealth management firms, broker-dealers, RIAs, compliance teams, operations leaders, and advisor enablement teams.

THE CHALLENGE

The value of Salesforce data is often locked across disconnected records, documents, notes, service processes, and manual follow-up.

Teams need more than another chatbot.

WHAT ARCUSX AI DOES

Summarize CRM context

Client, household, account, opportunity, and service history.

Extract document intelligence

Documents, notes, forms, emails, and transcripts.

Draft operational follow-up

Service updates, task summaries, notes, and narratives.

Surface gaps and risk

Missing information, next steps, risks, and process gaps.

Route each task deliberately

Select the right model or tool for task and data sensitivity.

Stage Salesforce updates

Prepare record changes for human review before execution.

Maintain audit history

Create a complete record of AI-assisted activity.

OPERATING PRINCIPLE

AI proposes. Humans decide.

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FIVE CORE PRINCIPLES

Five principles govern AI-assisted work

ArcusX AI balances productivity with business context, governance, human judgment, and a defensible record of how each action was produced.

01

Native Salesforce experience

Users stay inside Salesforce, where they already manage relationships, data, service requests, workflows, and operational activity.

02

Adaptive multi-model architecture

Requests are routed according to task type, data sensitivity, accuracy, latency, and cost efficiency.

03

Grounded responses through RAG

Verified firm documents and Salesforce data improve relevance and reduce hallucination risk.

04

Human-in-the-loop controls

Outputs can be reviewed before they create a task, update a record, trigger a workflow, or send a message.

05

Compliance readiness by design

Salesforce access controls, configurable review, data boundaries, accountability, and audit records are built in.

Grounded intelligence RAG retrieves relevant firm information before generating an answer.

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WHY MULTI-MODEL MATTERS

Route each request with purpose

A single-model strategy forces every request through the same path. ArcusX AI adapts routing to task, sensitivity, cost, latency, accuracy, and governance requirements.

Dimension	Single-model approach	ArcusX AI multi-model architecture
Task optimization	One model handles every task with mixed effectiveness.	Each task is routed to the best-suited model or tool.
Cost efficiency	Every request consumes premium model resources.	Simple tasks use lightweight models; complex tasks use advanced models.
Hallucination risk	Answers may rely mainly on pre-trained knowledge.	RAG grounds responses in verified organizational data.
Vendor lock-in	The solution depends on one model provider.	Multiple model providers can be integrated incrementally.
Future adaptability	Upgrades may require replacing the AI backbone.	New models can be added as capabilities evolve.
Data governance	All data follows the same processing path.	Sensitive data can be routed to approved models and infrastructure.

STAGE-AND-REVIEW WORKFLOW



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ARCUS EMAIL INTELLIGENCE

Turn email into intelligent, actionable Salesforce work.

Arcus Email Intelligence extends ArcusX AI beyond CRM records and documents by bringing approved email into the agentic workflow. It captures and interprets relevant messages, identifies intent, context, commitments and required next steps, then stages structured Salesforce actions for review and execution.

FROM EMAIL TO GOVERNED ACTION

Surface critical email intelligence
Flag client details, commitments, risks, deadlines and changes communicated by email.

Route required approvals
Send items requiring manager, compliance or operational approval into the appropriate review workflow.

Stage reminders and follow-ups
Identify client reminders and follow-up items, then stage tasks for the appropriate team member.

Connect threads to Salesforce
Summarize email threads and associate intelligence with the correct client, household, account, opportunity or service record.

Create service requests
Create or stage Salesforce service requests based on inbound client needs.

Coordinate multi-step follow-up
Use ArcusX AI agents to coordinate follow-up while keeping human review and governance in the loop.

THE RESULT

Email becomes governed operational intelligence—not another disconnected inbox. **Teams respond faster, reduce missed follow-ups and keep Salesforce current with less manual effort.**

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HUMAN-IN-THE-LOOP CONTROLS

AI proposes. Humans decide.

Configured review stands between AI output and an operational consequence.

CONFIGURABLE OVERSIGHT

Full review

Every output requires individual review and explicit approval for high-stakes client, financial, compliance, or external communications work.

Batch review

Routine outputs can be grouped so users approve, modify, or reject multiple staged items in one workflow.

Supervised autonomy

Well-defined, low-risk actions may use post-action review, notification, reversal, and a complete audit trail.

BUSINESS IMPACT

- **Improve advisor and operations productivity**
- **Increase Salesforce adoption and data usability**
- **Reduce manual review across documents and CRM activity**
- **Preserve human control over record changes**
- **Ground responses in firm-approved data**
- **Reduce dependency on one model provider**
- **Maintain a defensible audit trail**
- **Support compliance and governance expectations**

BUILT FOR

Wealth management firms, RIAs, broker-dealers, compliance, operations, advisor enablement, IT, and innovation teams.

ABOUT ARCUSX AI™

ArcusX AI™ is an innovation of Arcus Partners. It combines native Salesforce AI, document intelligence, data-management capabilities, and supervised automation to help financial institutions modernize operations and turn institutional knowledge into practical intelligence.

Built on Arcus Partners' experience across capital markets, securities back-office operations, data aggregation, Salesforce implementation, and system integration, ArcusX AI helps firms adopt AI responsibly while improving daily execution.

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