Finity360™ CLIENT PORTAL

NATIVE SALESFORCE CLIENT EXPERIENCE

PRODUCT OVERVIEW

EMPOWERING CLIENTS WITH INTELLIGENT, SELF-SERVICE WEALTH MANAGEMENT

Secure access to accounts, documents, service requests and advisor communications - all in one unified, AI-powered platform.

Finity360™ Client Portal is a modern, AI-powered digital experience purpose-built for wealth management firms, RIAs and broker-dealers - giving clients secure, self-service access to financial accounts, documents, service requests and advisor communications in one unified platform.

PORTFOLIO INTELLIGENCE + ARCUSX AI ASSISTANT

KEY BENEFITS

Unified Client Experience

One portal for accounts, documents, messages and service requests.

Real-Time Portfolio Access

Current balances, holdings and account data through live Salesforce FSC integration.

Enterprise Security

AWS Cognito, server-side credential isolation, encrypted transit and planned MFA.

AI-Driven Self-Service

Natural-language answers free advisors and service teams for higher-value work.

Seamless Integration

Extend Salesforce and portfolio systems without rip-and-replace disruption.

Scalable & Future-Ready

Cloud-native AWS architecture scales with the business and evolving requirements.

ONE PORTAL. REAL-TIME INSIGHT. INTELLIGENT SELF-SERVICE.

2026 Arcus Partners. All rights reserved.

ONE CONNECTED CLIENT EXPERIENCE

Real-time visibility. Intelligent self-service.

Clients can view portfolios, access documents, message advisors, submit requests and ask questions - all through one secure, connected Salesforce experience.

CORE EXPERIENCE

Portfolio Dashboard

Live balances, holdings, allocation charts and performance analytics from Salesforce FSC.

Document Vault

Secure statements, tax forms and uploads directly from Salesforce.

Secure Messaging

Encrypted advisor-client communication with threading and attachments.

Service Center

Submit and track requests with status updates and activity timelines.

ArcusX AI Assistant

Natural-language, context-aware answers about portfolios, documents and requests - grounded in the firm's own Salesforce data.

PORTFOLIO INTEGRATIONS

Connect Orion, Black Diamond, Addepar, Advyzon and Envestnet in one client experience.

AI CAPABILITIES - POWERED BY ARCUSX AI

Natural Language Queries

Ask about accounts, holdings and documents in plain English - no navigation required.

Contextual Awareness

Understands which records and documents belong to the authenticated client.

Data-Grounded Responses

Answers are informed by real Salesforce data - never fabricated financial information.

Action Suggestions

Recommend next steps: submit requests, upload documents or contact advisors.

2026 Arcus Partners. All rights reserved.

SECURITY & PRIVACY

Secure by design. Built for client trust.

Client intelligence remains grounded in Salesforce while identity, credentials, queries and data stay protected behind the experience.

DOCUMENT INTELLIGENCE + SERVER-SIDE SECURITY

Useful intelligence, protected behind the client experience.

Documents and communications can be classified, summarized and surfaced while AI processing remains server-side. OAuth 2.0 with PKCE, isolated credentials, parameterized SOQL, HTTPS/TLS and role-based controls protect access.

01	02	03	04	05
Sign in	Ask	Access	Request	Track

Multi-Factor Authentication - Planned

TOTP authenticator app support will add a critical second layer of protection.

BUSINESS IMPACT

Reduce operational costs

Lower manual effort across routine client service.

Accelerate decisions

Use real-time portfolio and client intelligence.

Improve client service

Respond faster through connected interactions.

Strengthen compliance

Reduce regulatory risk with secure, governed access.

Maximize existing systems

Extend Salesforce and portfolio platforms.

Designed for

Wealth firms, broker-dealers, RIAs, advisor and operations teams, and client service teams.

ONE SECURE CLIENT EXPERIENCE. BUILT ON SALESFORCE. POWERED BY ARCUSX AI.

Enterprise-grade solutions for financial services organizations.

1500 Chestnut St. #1009, Philadelphia, PA 19102 USA
+1 (888) 942-7287 | www.arcuspartners.com

2026 Arcus Partners. All rights reserved.