

LAKEWORTH Wealth Management Accelerator

On Salesforce FSC: Built for Advisors. Aligned to Results.

Go live on Salesforce FSC —fast, with a purpose-built accelerator

Salesforce FSC provides a flexible foundation for wealth firms—but without the right configuration and industry alignment, most firms struggle to unlock its full potential.

Lakeworth’s Wealth Management Accelerator solves that by delivering pre-built relationship models, advisor dashboards, and client-focused workflows designed around how wealth teams actually work.

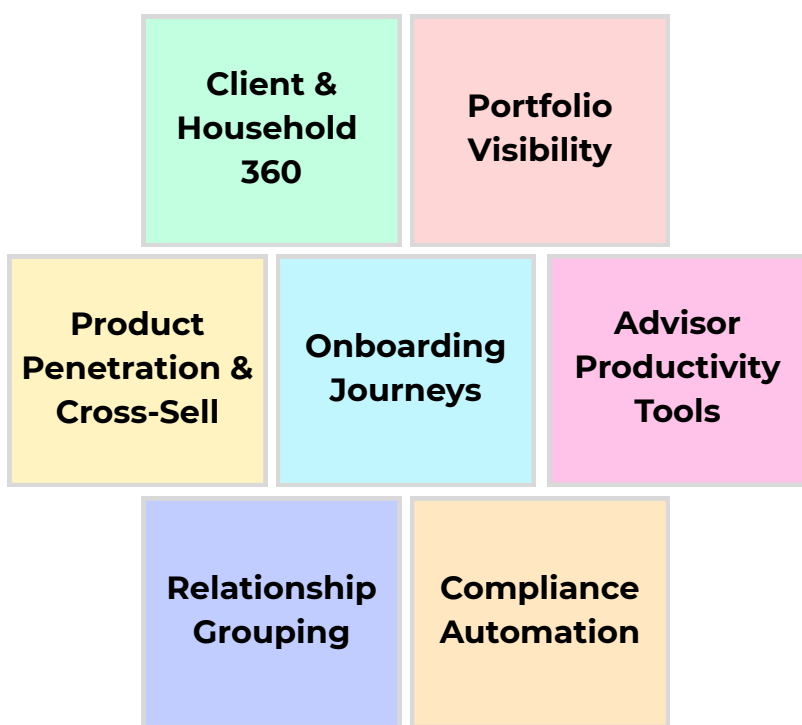
This solution removes complexity and guesswork—so your advisors can focus on what matters: deepening relationships, maximizing share of wallet, and delivering exceptional client experiences.

FSC Accelerator Kit for Wealth Management

For wealth firms seeking a defined path to modernize CRM and drive adoption

Lakeworth’s FSC Accelerator for Wealth Management delivers a fully-configured jumpstart tailored to the day-to-day needs of Advisors, Client Associates, and Portfolio Managers.

Functional Areas Covered

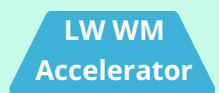


What’s Included

- ✓ Pre-built Advisor Console
- ✓ Household + Relationship Models
- ✓ Integrated Compliance Checklists
- ✓ Portfolio Snapshot & Planning Tools
- ✓ Actionable Dashboards (Pipeline, Referrals, AUM Trends)
- ✓ Referral + COI Tracking
- ✓ Service Case Management
- ✓ KYC/AML & Compliance Flows

Accelerator Value

FSC-Aligned Foundation	Built natively on Salesforce FSC and aligned to the wealth management roadmap
Faster Time to Value	30–40% faster go-live compared to traditional implementations
Designed for Adoption	Role-based advisor console with household-centric views and guided workflows
Tailored for Wealth	Supports advisory, planning, and service workflows across the full client lifecycle
Data-Driven Growth	Surface AUM insights, whitespace, referrals, and next-best actions
Compliance Ready	Integrated KYC, AML, and onboarding flows to reduce risk and improve efficiency



40% 
faster go-live

About Us

Lakeworth Digital is a boutique Salesforce consulting partner founded by former ProServe leaders. We help banks and wealth firms unlock value with focused, nimble, expert-led execution.



ProjectReviews
★★★★★

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“Lakeworth Digital’s expertise in FSC Implementation and deep knowledge of Financial Services significantly accelerated our Salesforce implementation. From day one, they collaborated seamlessly with our teams and stakeholders, delivering strategic outcomes efficiently.”

- Head of Salesforce Platform, Banking Customer