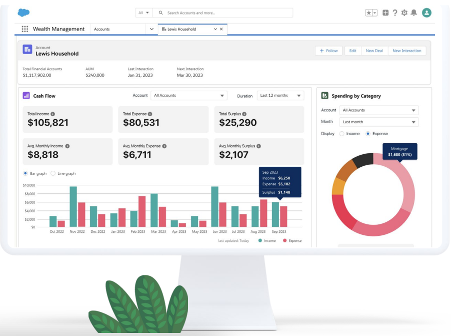
Financial Services Cloud Winter '25 Release

External Approved

Our Roadmap is Driven by Customer Priorities

Winter '25 Release Themes

Data Driven Engagement



Summer '24

New Calculated Insights

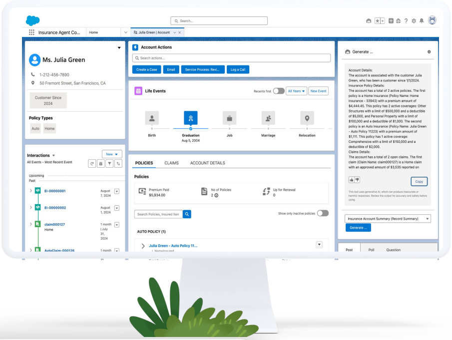
Winter '25

Data Cloud for Insurance

Winter '25

Contextual Alerts

Embedded AI Automation



Winter '25

Complaint Summary

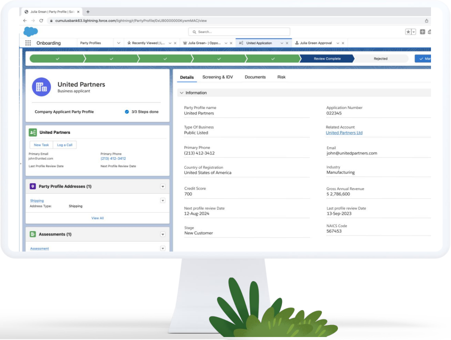
Winter '25

Wealth Client Summary

Winter '25

Insurance Account & Claim Summaries

Commercial Banking Innovation



Summer '24

Beneficial Ownership

Summer '24

Know Your Business (KYB)

Winter '25

Business Relationship Planning

Financial Services Cloud Release summary

Winter ‘25 Release

Einstein Enhancements for Banking & Wealth

Increase efficiency for your service center and wealth advisors with the power of AI.

Einstein for Insurance

Deploy Generative AI for instant account & claim summaries and improve policyholder experience

Data Cloud for Insurance

Unify data from core policies to personalize journeys for policyholders and producers

Business Relationship Planning

Strategize, collaborate, and execute with AI to deepen client relationships and grow revenue.

Contextual Alerts

Increase efficiency with prebuilt alerts for bankers and wealth advisors

Fact Finding for Wealth Managers

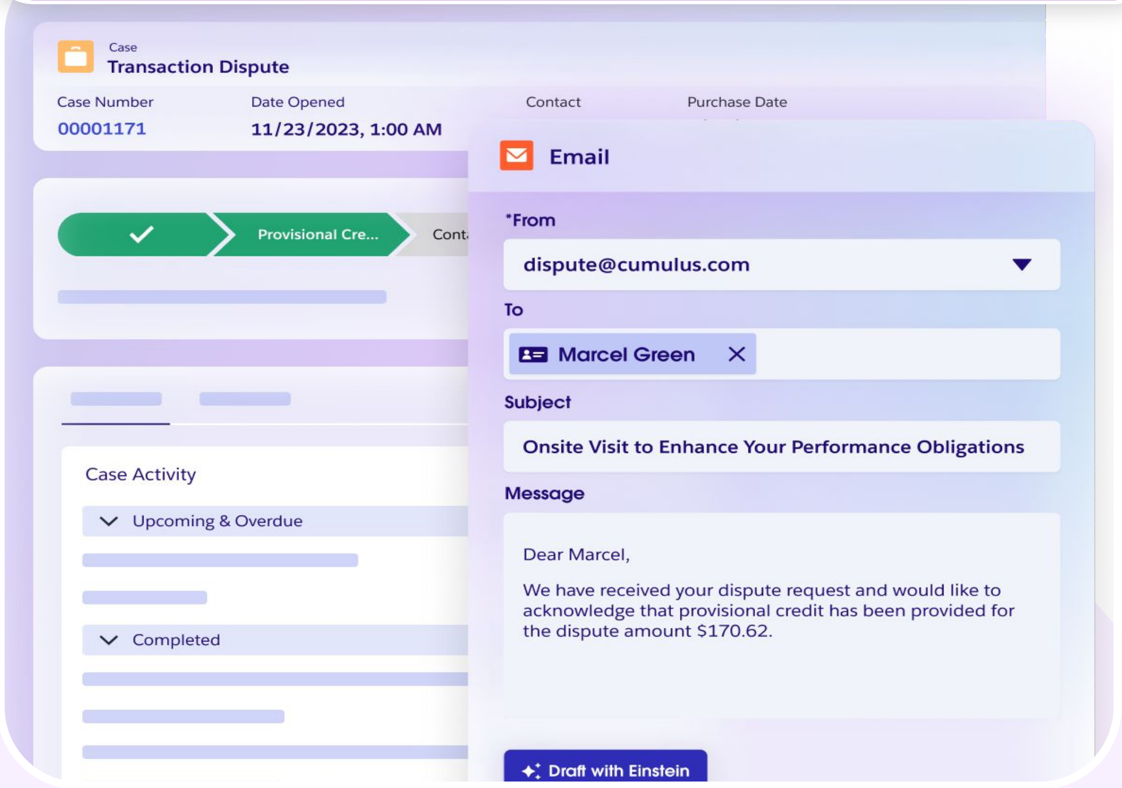
Deepen customer trust by understanding clients’ needs to provide tailored advice

Product Release Notes

Einstein Enhancements for Banking & Wealth

Making AI easy by embedding **turnkey AI solutions** in your workflow

Embedded in Your Flow of Work

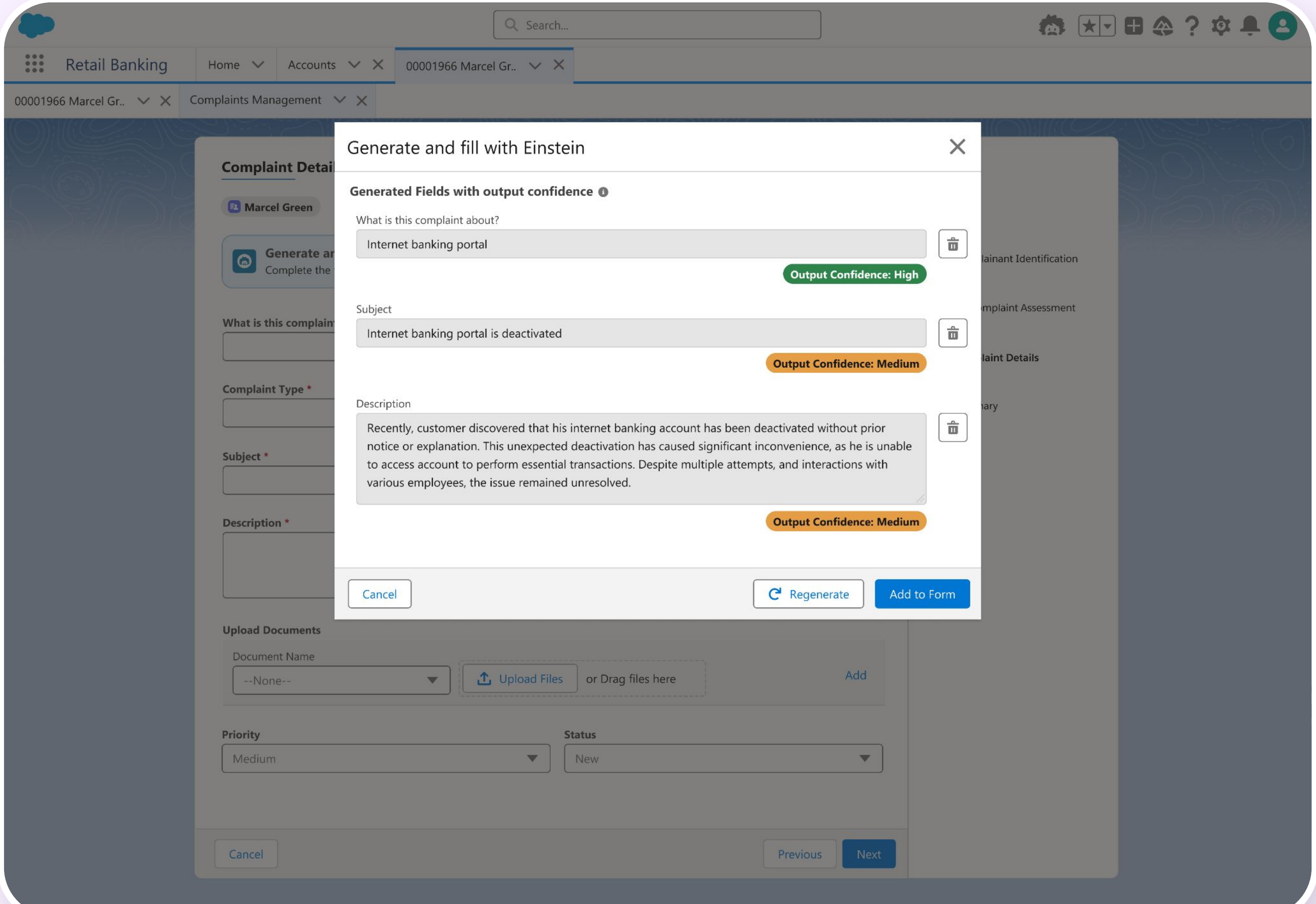


- **User-friendly AI,** directly in your business processes
- **Easily configurable and personalized** to suit your business needs
- **Trusted and Secure** with Einstein Trust Layer
- **Accurate and reliable** outputs, powered by your data for your customers
- **Tangible benefits** for both sales and service teams

AI Autofill for Complaints

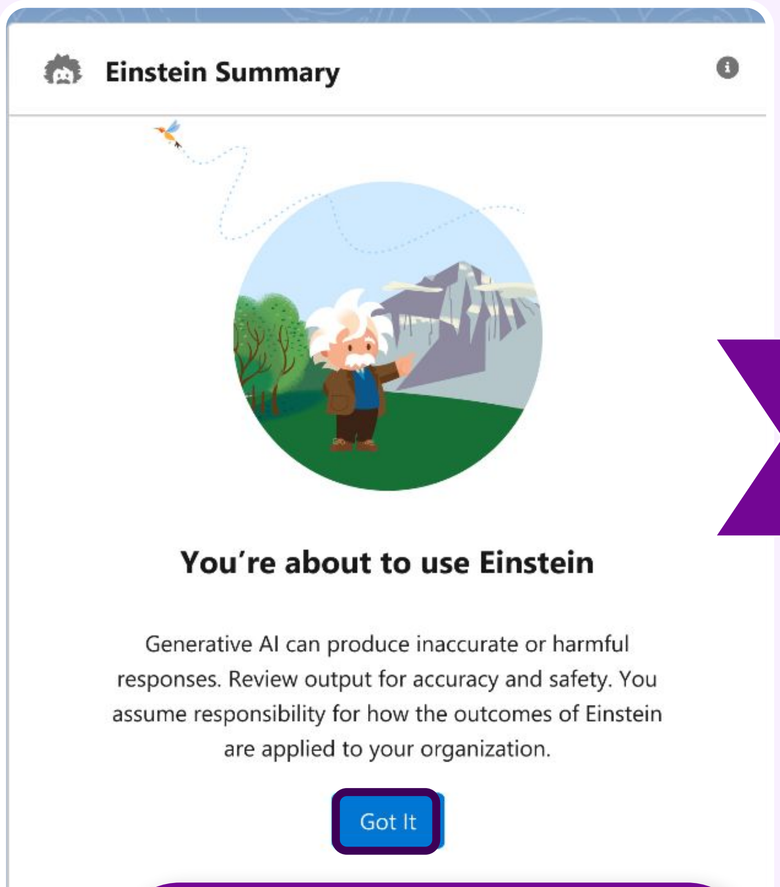
Eliminate the need to manually key in complaint case titles and descriptions with AI

Simplify the complaint intake process and boost agent efficiency with AI Autofill. Titles and descriptions for complaint cases can be auto-populated through keyword detection via phone calls or chats

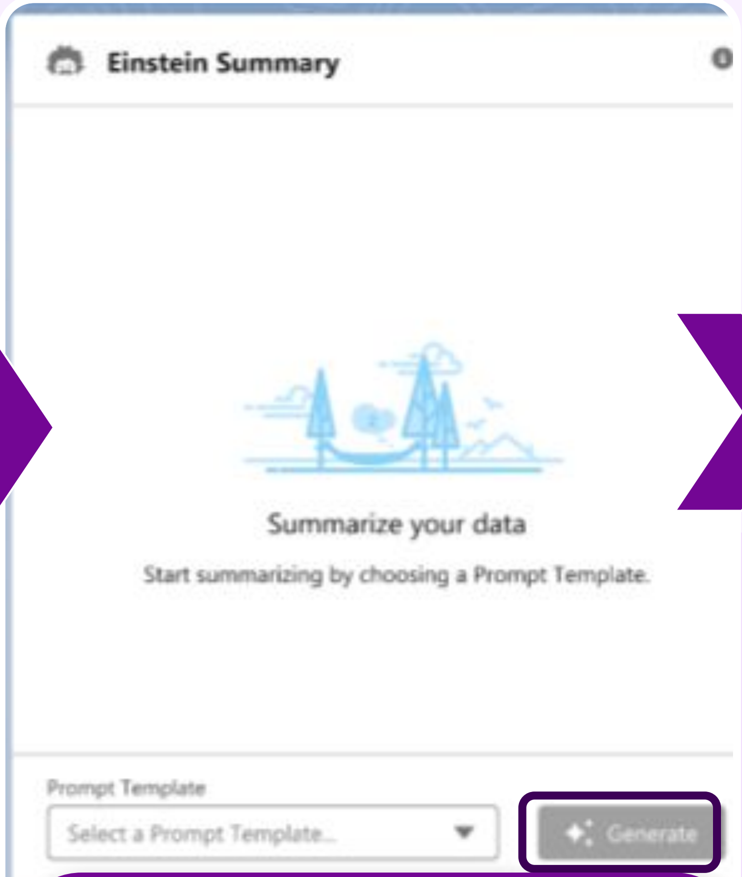


Auto-Generated Complaint Summaries

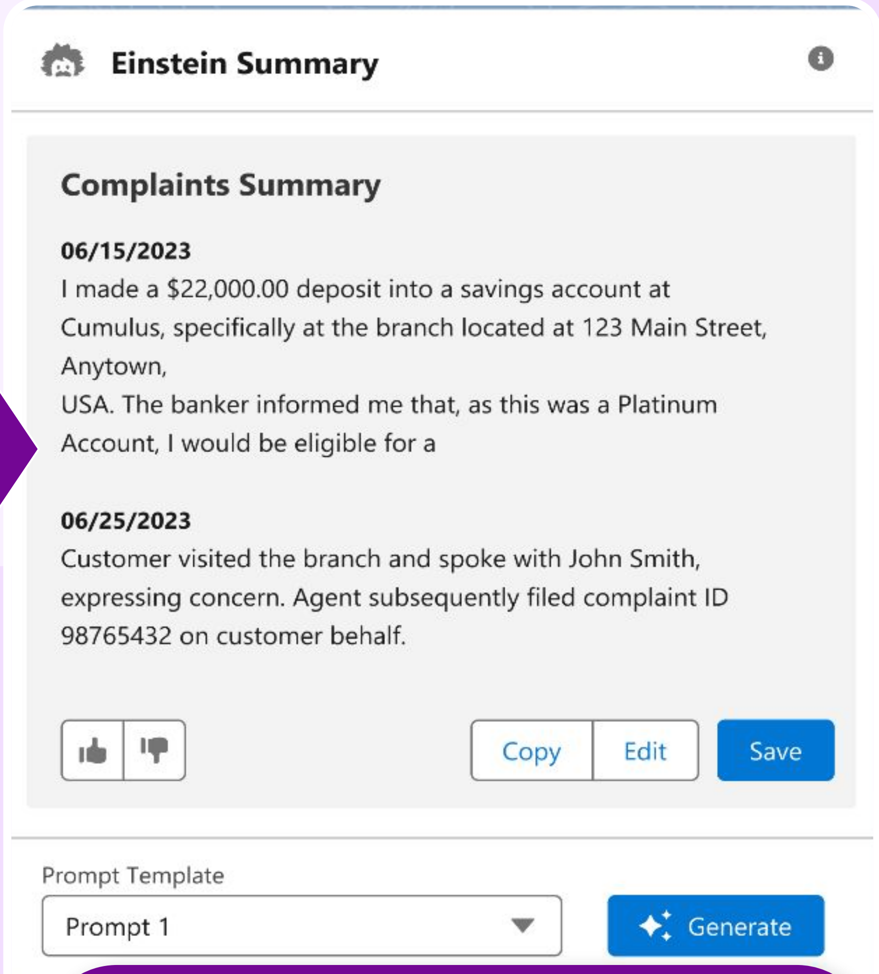
Quickly get up to speed with AI-generated complaint summaries, reducing the time spent reviewing complaint-related communications.



Fuel Complaint Manager Productivity



Increase complaint management efficiency to **reduce operational cost**

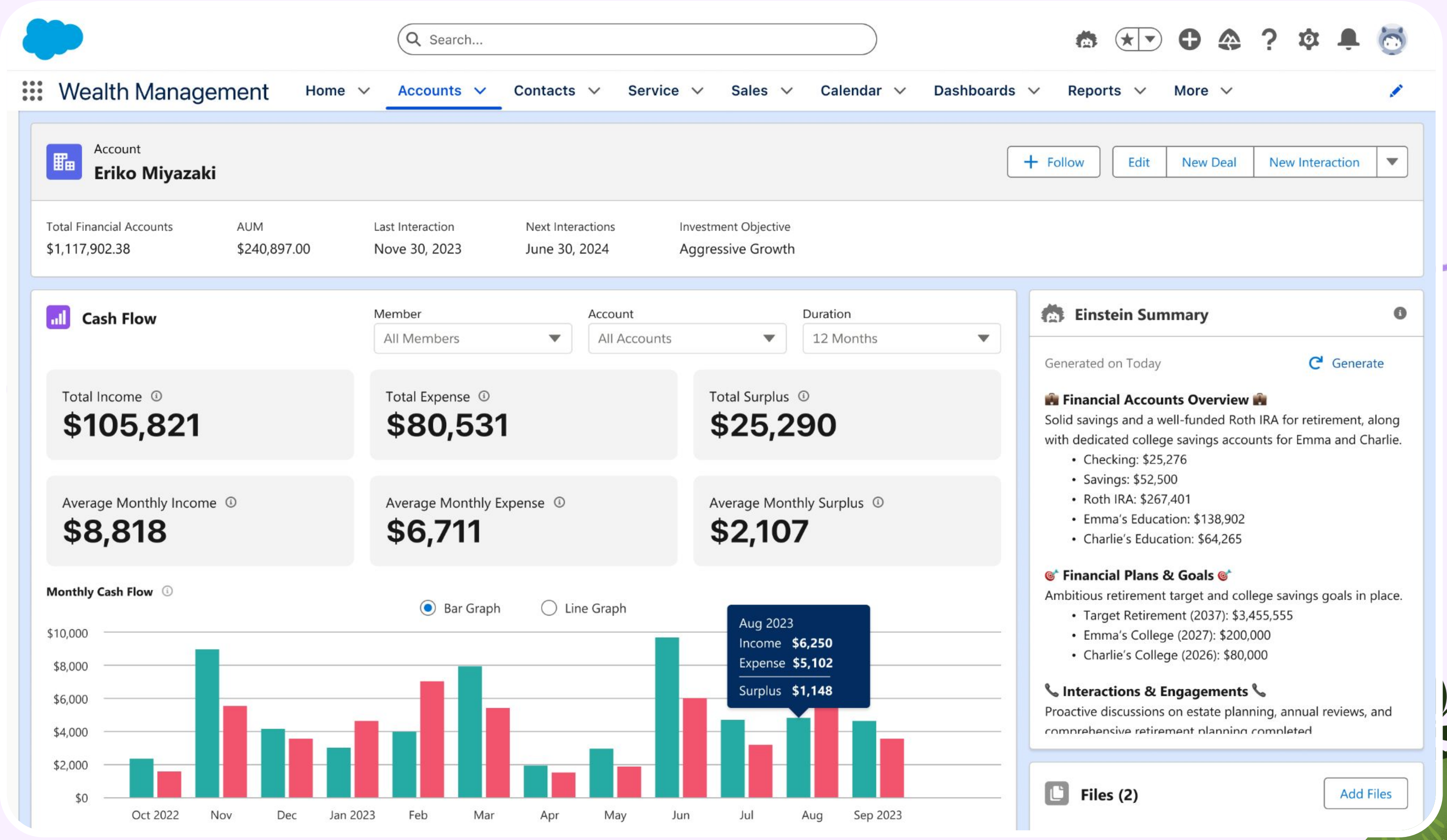


Enhance Customer Retention with Superior Customer Service and Effective Complaint Management

Einstein Enhancements for Wealth

Provide client summaries with context and data about financial status and plans & goals

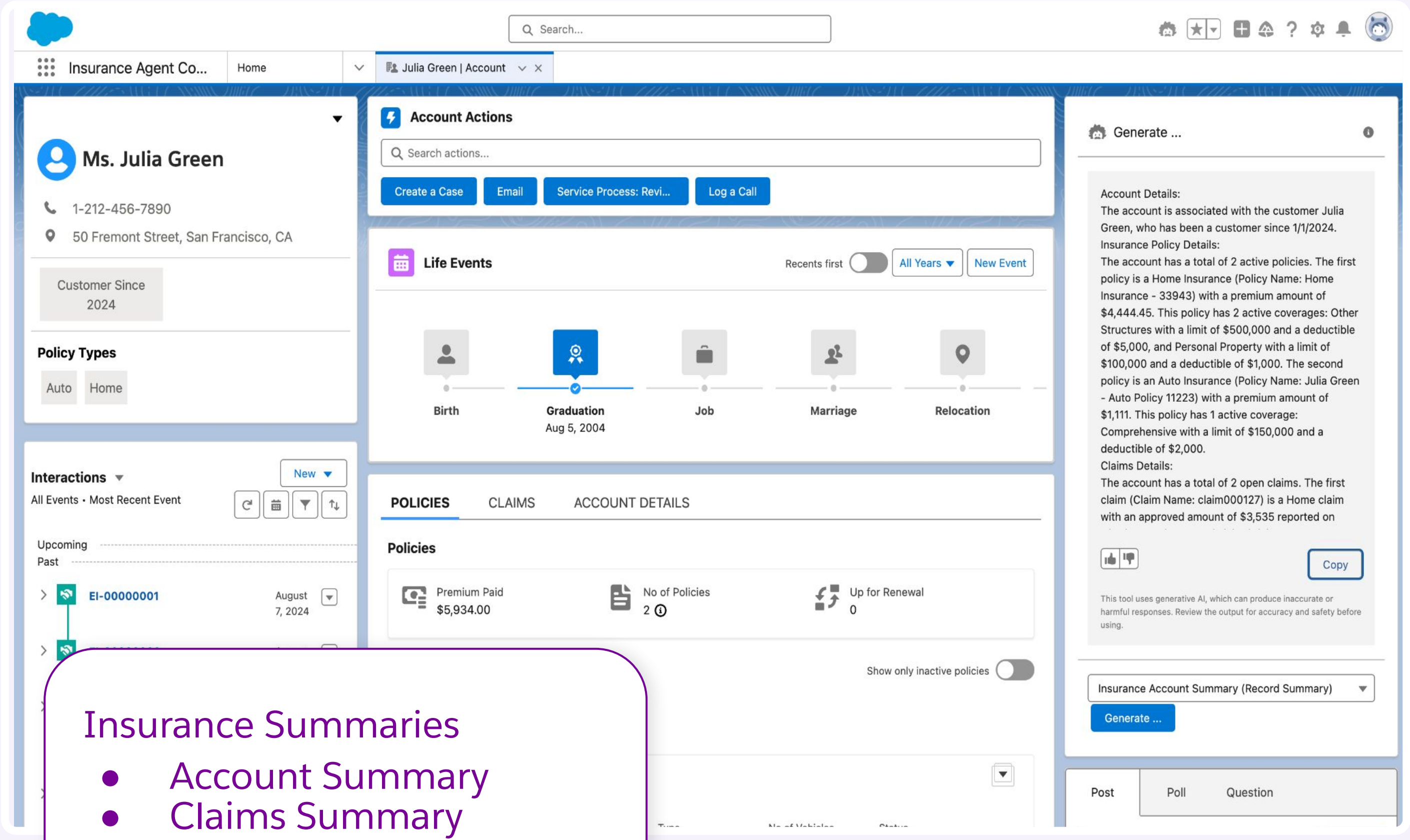
Improve wealth advisor productivity by providing detailed AI client summaries including clients' relationship, life events, plans, goals, and net worth.



Einstein for Insurance

Einstein for Insurance

Deploy Generative AI for instant account & claim summaries



Insurance Summaries

- Account Summary
- Claims Summary

Integrate Generative AI experiences into your insurance workflows with ease

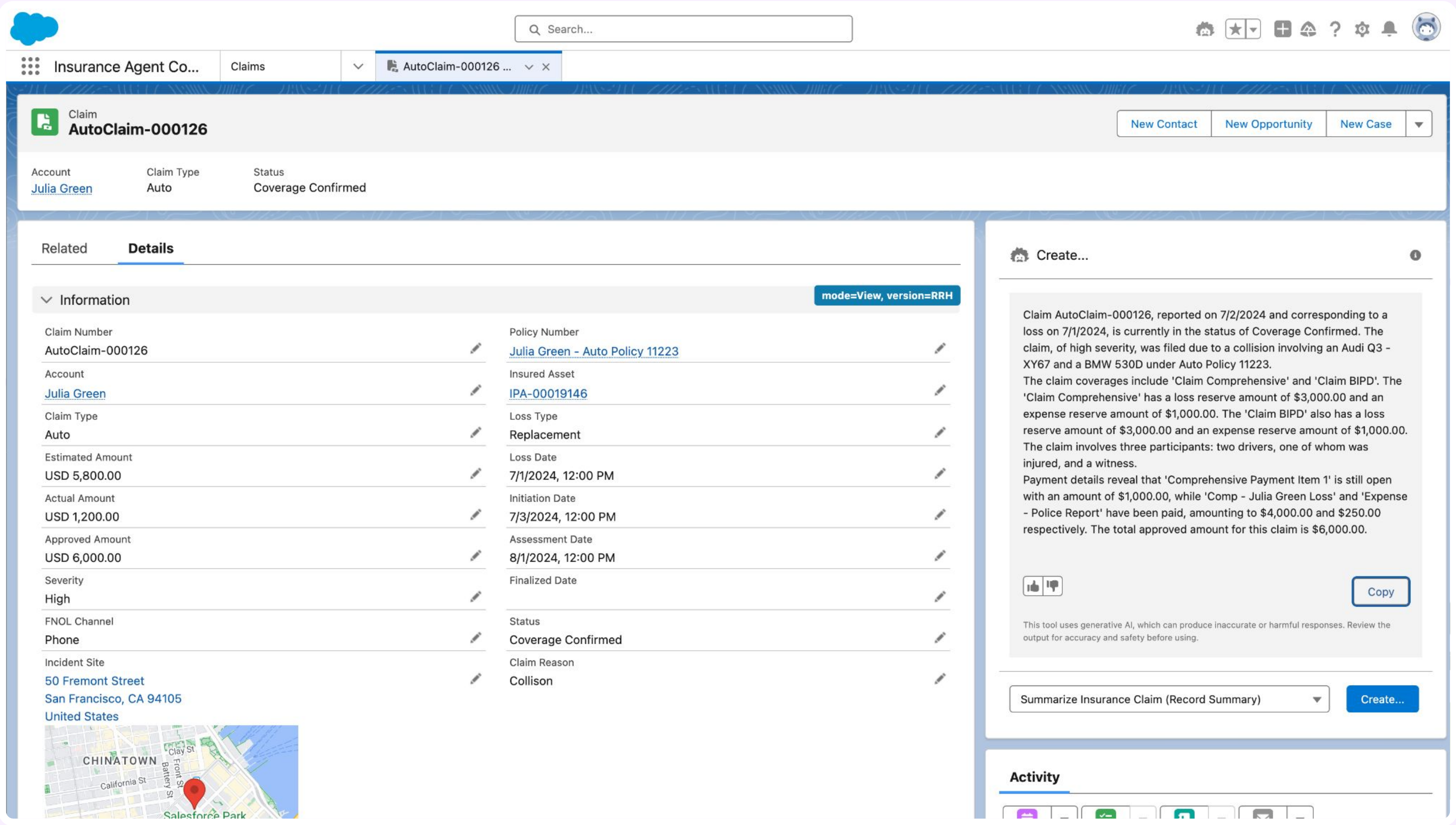
Augment AI with insurance data models to aid CSRs & claims adjusters to get to context quickly, at a click of a button

AI Assists CSRs & claims adjusters to lower response time and for better claim evaluations

Einstein for Insurance

Deploy Generative AI for instant account & claim summaries

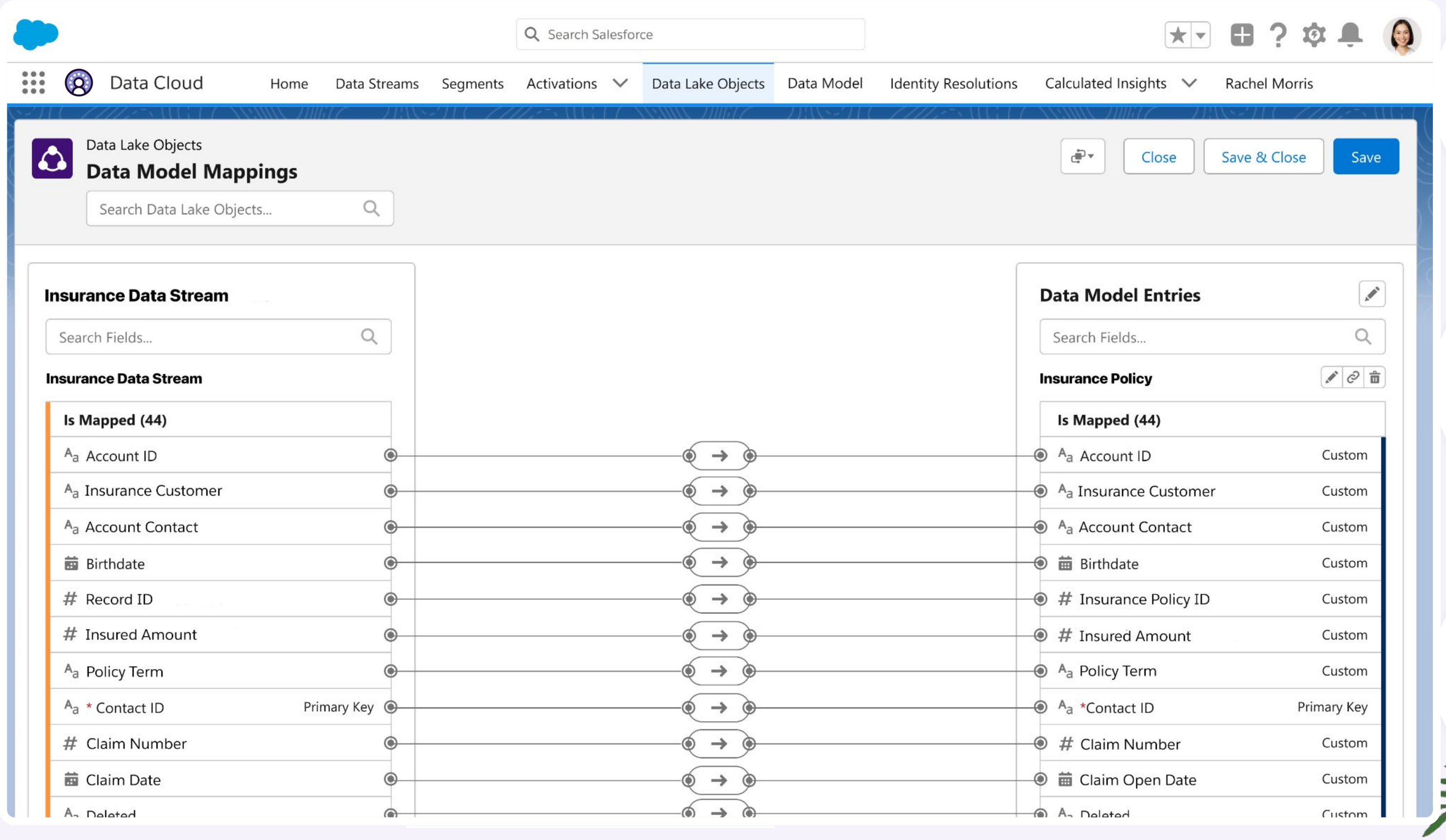
Generate accurate claim summaries grounded in business data



Data Cloud for Insurance

Data Cloud for Insurance

Unify data from core policies & claims to personalize journeys for policyholders & producers



Unlock insurance policy and claims data to swiftly query and summarize accounts, policies and claims

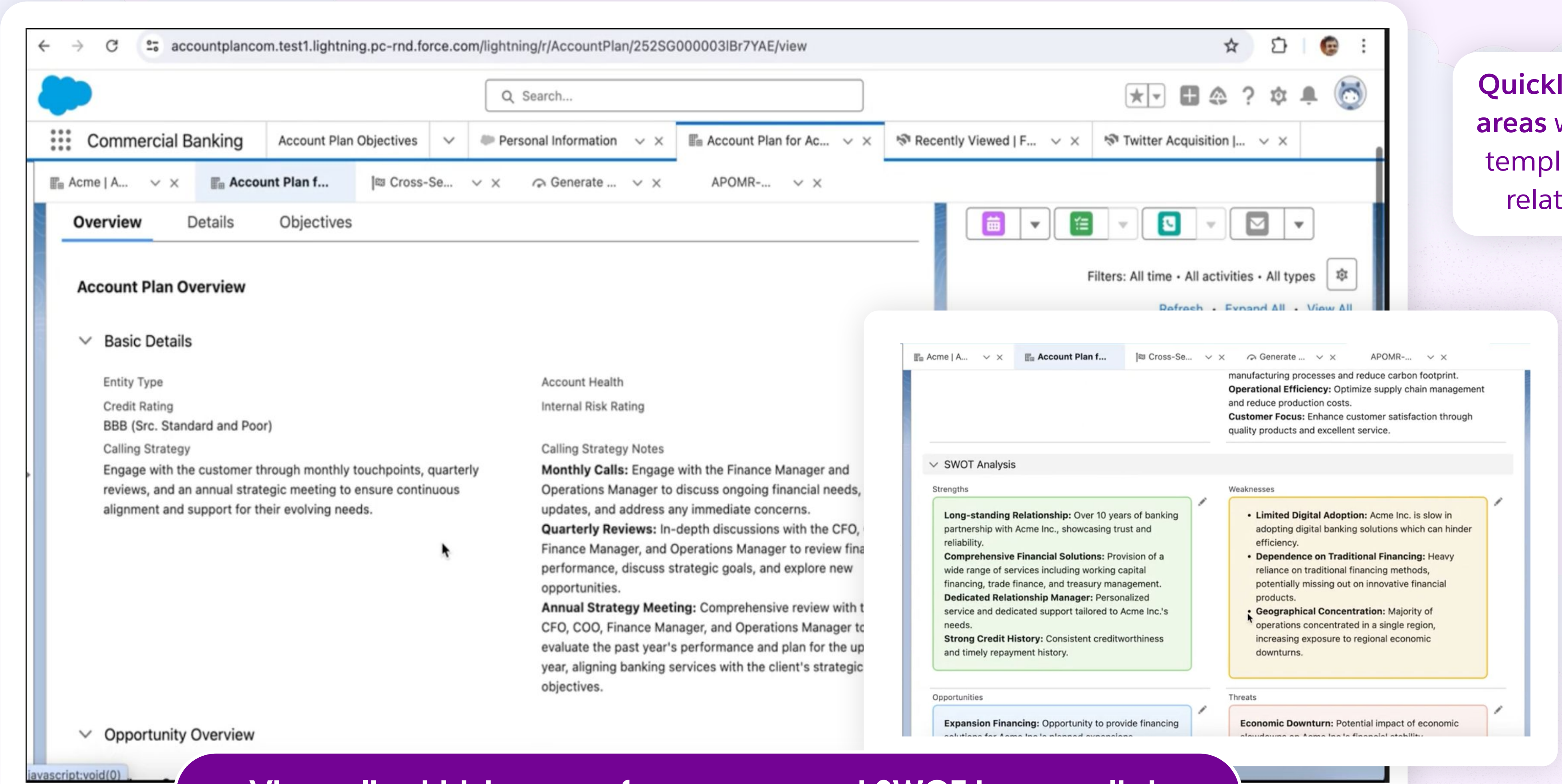
Access data in real time to provide updates and insights to agents and brokers

Segment customers and drive automated action via your engagement channels

Business Relationship Planning

Create Business Relationship Plans with Ease

Easily create plans using pre-built templates that provide a comprehensive view of your client and their business performance, all in a single dashboard

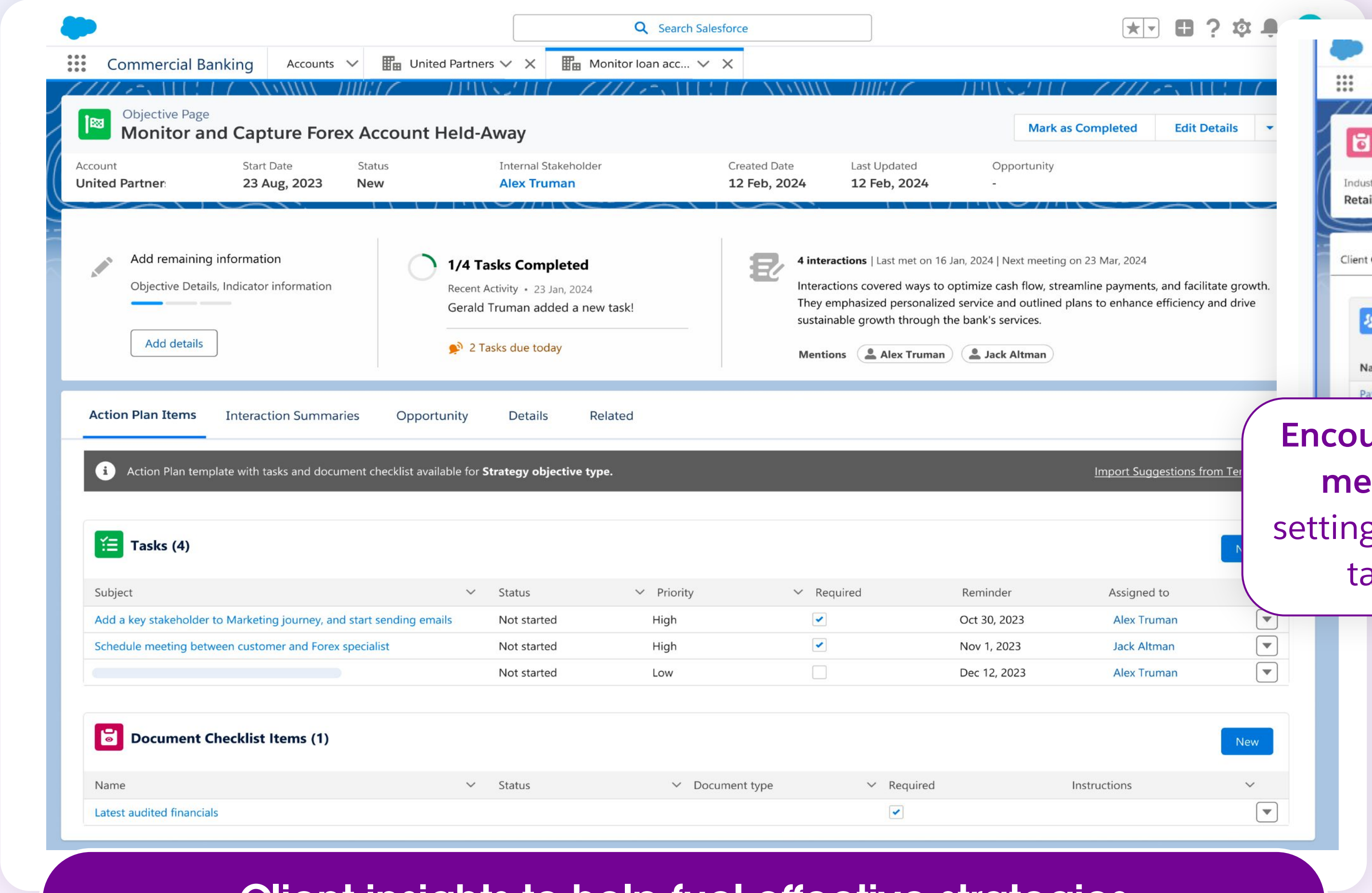


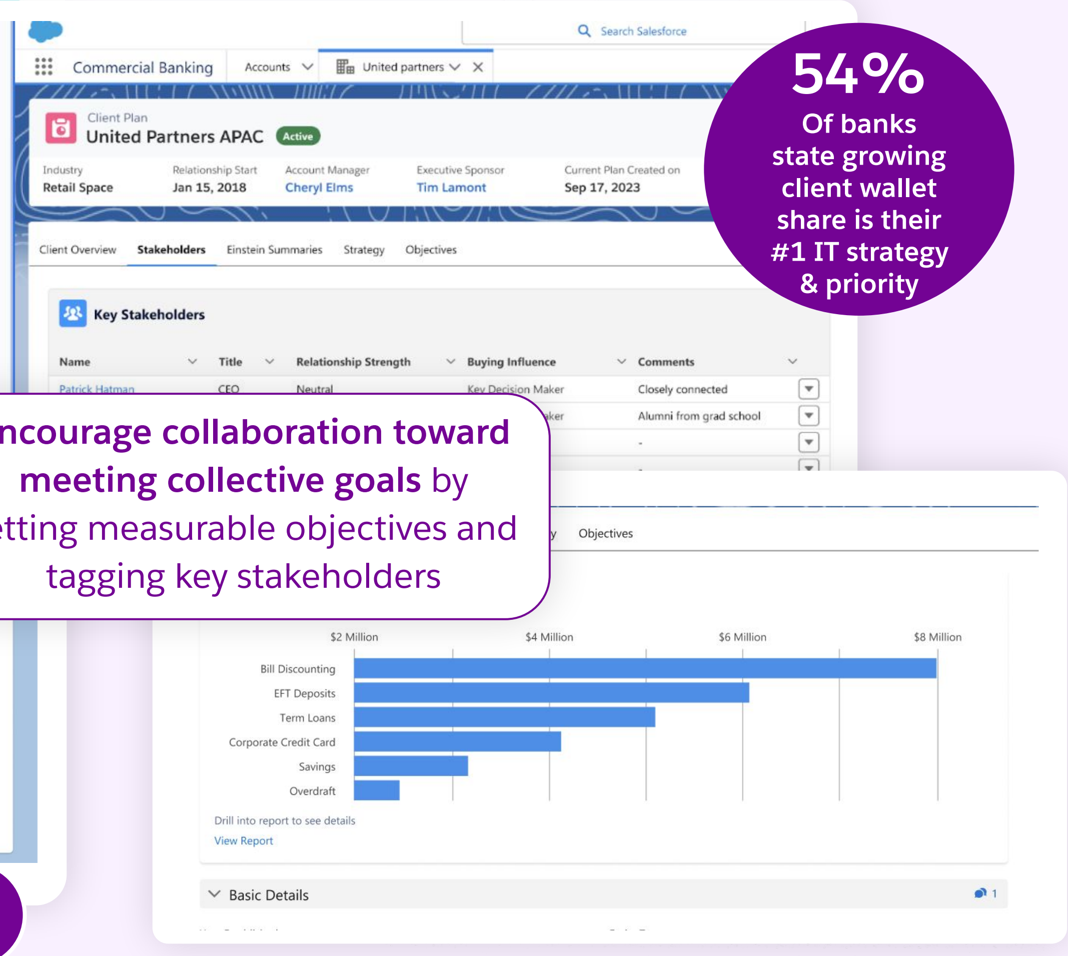
Quickly assess opportunity areas with pre-built, custom templates and AI-powered relationship summaries

View client history, performance, and SWOT in one click

Work Together to Develop Winning Strategies

Use data and client insights to help inform successful strategies while gathering input from stakeholders in a centralized platform to help deliver on both organizational and client goals





54%

Of banks state growing client wallet share is their #1 IT strategy & priority

Encourage collaboration toward meeting collective goals by setting measurable objectives and tagging key stakeholders

Client insights to help fuel effective strategies

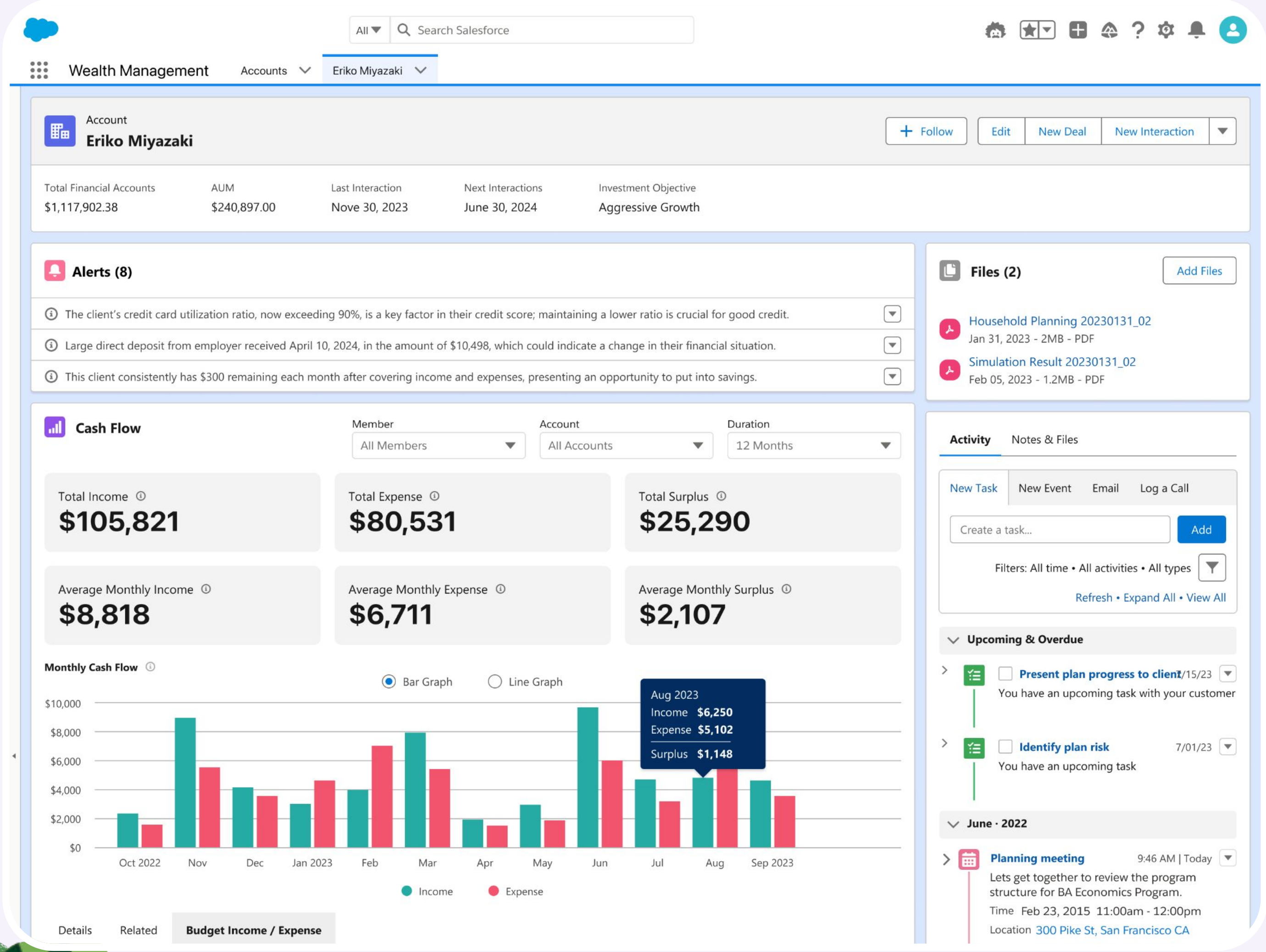
Sources:Celent,McKinsey,Accenture

Contextual Alerts

GA in Nov. ‘24

Contextual Alerts

Increase efficiency with prebuilt alerts for bankers and wealth advisors



Alert bankers and wealth managers based on signals and behaviors

Activate alerts quickly with guided setup to configure an alert in about 5 minutes

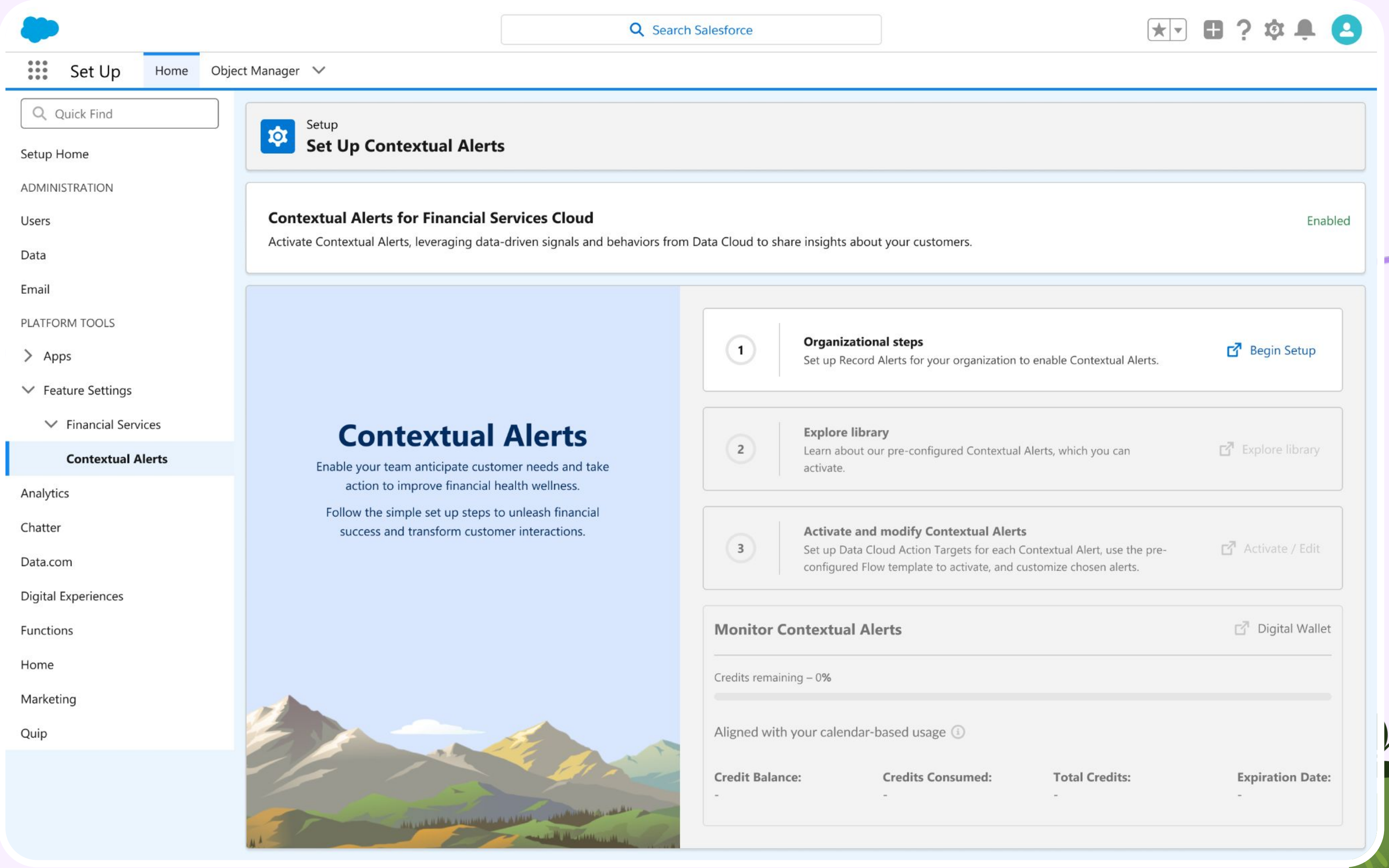
Drive productivity with a prebuilt library of alerts

GA in Nov. ‘24

Contextual Alerts

Increase efficiency with prebuilt alerts for bankers and wealth advisors

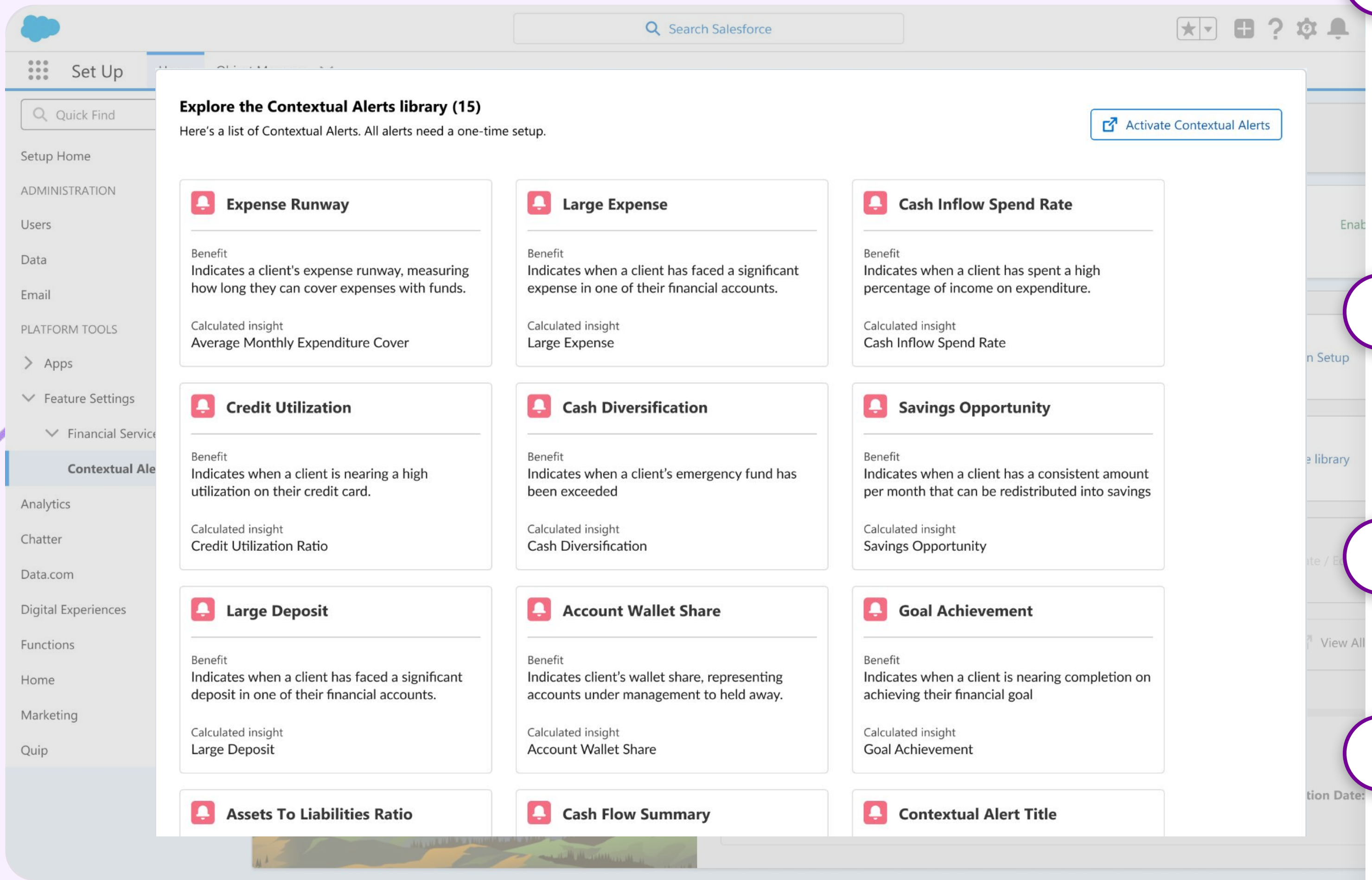
Configure an alert in about 5 minutes using guided setup



GA in Nov. ‘24

Contextual Alerts

Increase efficiency with a library of prebuilt alerts for bankers and wealth advisors



Spending

Expense Runway
Large Expense
Percentage of Cash Inflow Spent
Cash Flow Summary
Credit Utilization

Savings

Cash Diversification
Savings Opportunity
Large Deposit

Financial Asset & Liabilities

Total Outstanding Credit
Percentage of Assets to Liabilities

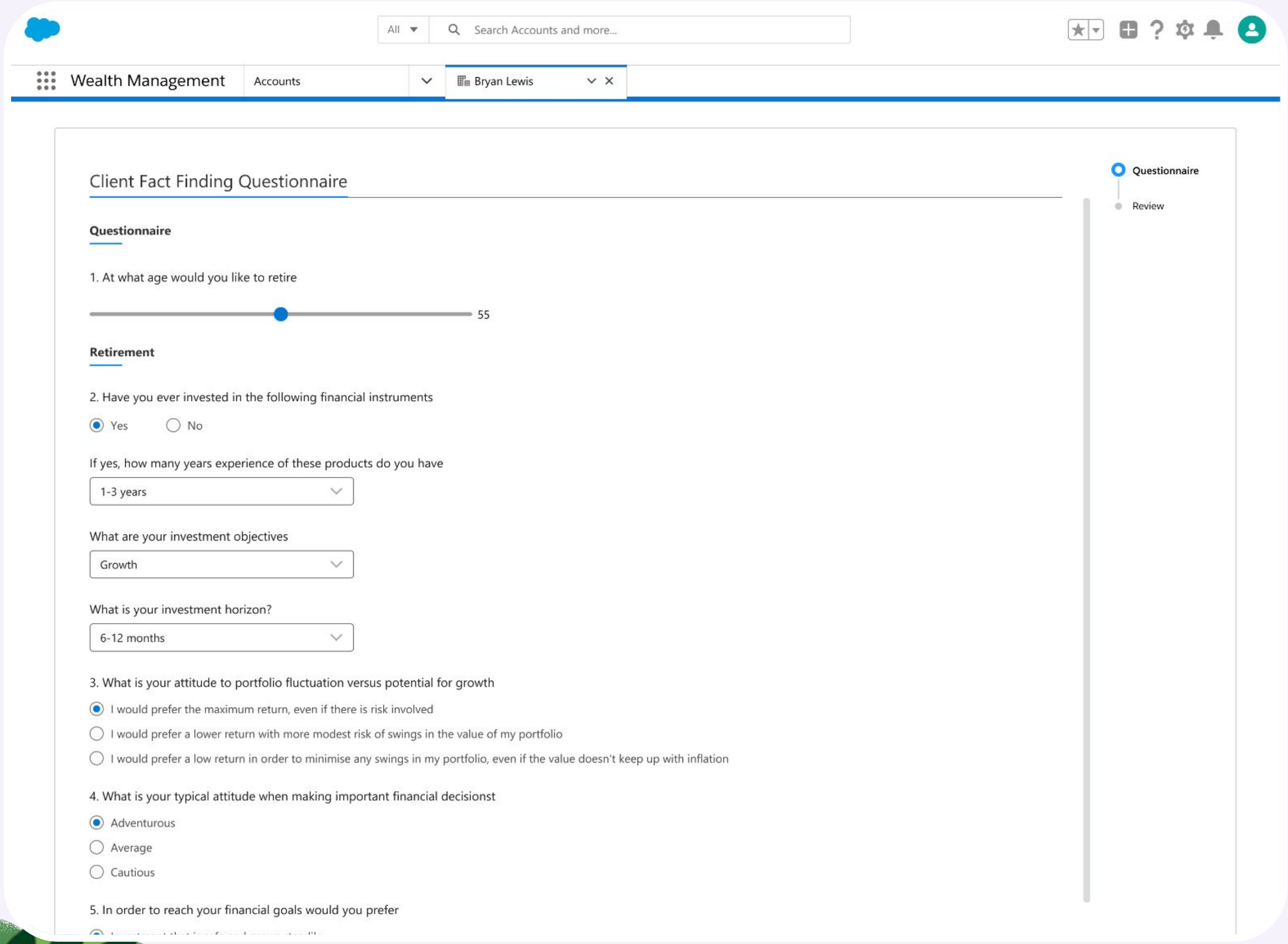
Other Alerts

Financial Account Balance Wallet Share
Goal Achievement

Wealth Management Fact Finding

Wealth Management Fact Finding

Deepen customer trust by understanding clients' needs to provide tailored advice



Assess risk tolerance by capturing financial answers using an intuitive user interface for financial advisors.

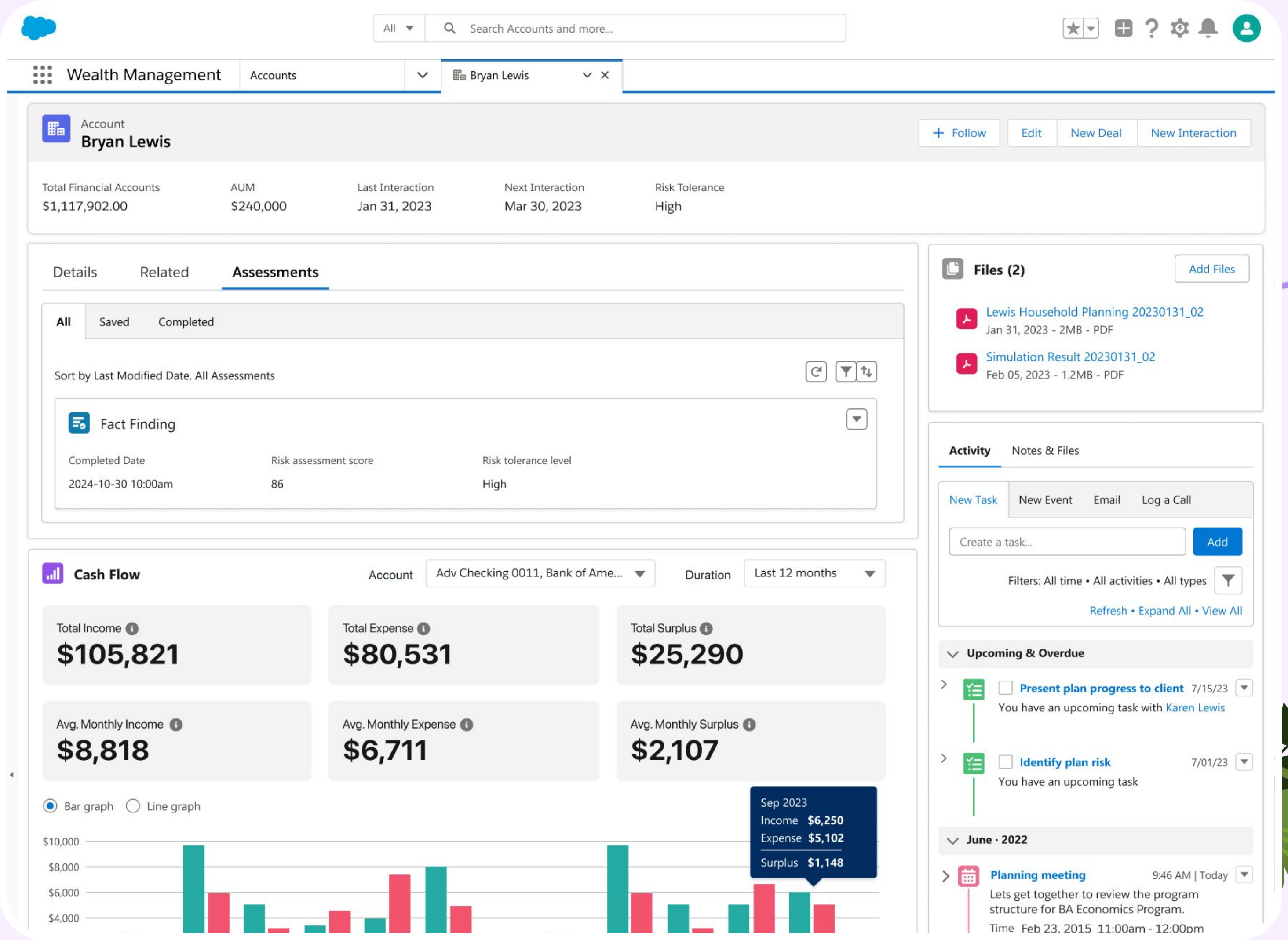
Personalize the assessment to meet you firm's standards by customizing an OOTB experience

View risk tolerance scores and all historically completed fact finding assessments

Wealth Management Fact Finding

Deepen customer trust by understanding clients' needs to provide tailored advice

View the risk tolerance score and all historically completed fact finding assessments. Export the questions and answers for the client.



Thank you