

Financial plan generation

This workflow automatically generates comprehensive financial plans when new clients complete onboarding, combining risk assessment, goal analysis, and portfolio recommendations to deliver personalized financial strategies within 24 hours.

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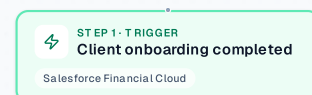
WORKFLOW TRIGGER



Client completes onboarding questionnaire and uploads financial documents in Salesforce Financial Cloud

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Client onboarding completed

New client submits completed onboarding form with financial goals, current assets, and risk preferences through Salesforce Financial Cloud. System validates all required documentation is present.

2

 ACTION

Generate risk profile assessment

Client responses are automatically processed through Riskalyze to calculate risk tolerance score and capacity. System creates detailed risk profile with investment preferences.

Riskalyze

Salesforce Financial Cloud

3

 ACTION

Import financial data

Client's current portfolio positions and account balances are imported from linked accounts into MoneyGuidePro. Historical performance and asset allocation are analyzed.

MoneyGuidePro

Orion

4

 DECISION

Evaluate plan complexity

System determines if client requires basic investment plan or comprehensive financial planning based on asset levels, goal complexity, and risk factors. Routes to appropriate planning template.

MoneyGuidePro

5

 ACTION

Generate financial projections

AI Business OS

MoneyGuidePro creates detailed financial projections, retirement scenarios, and goal-based recommendations. System calculates optimal asset allocation and investment strategy.

MoneyGuidePro

Riskalyze

6

 ACTION

Create client deliverables

Automated generation of personalized financial plan report with executive summary, investment recommendations, and action items. Plan is saved to client record with scheduled review dates.

MoneyGuidePro

Salesforce Financial Cloud

Redtail CRM

7

 OUTPUT

Deliver completed financial plan

Finalized financial plan is automatically sent to client via secure portal and advisor is notified to schedule follow-up meeting. Client record is updated with plan status and next steps.

Salesforce Financial Cloud

Redtail CRM



Outputs

- Personalized financial plan document

AI Business OS

- Risk assessment report
- Investment recommendation summary
- Client follow-up task assignments



Key Metrics

- Plan generation time (target: <24 hours)
- Client plan acceptance rate
- Advisor review efficiency
- Time to first client meeting



Tools & Integrations

- Salesforce Financial Cloud
- Riskalyze
- MoneyGuidePro
- Orion
- Redtail CRM

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

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