

How a Boutique Wealth Firm's Platform Elevates Charitable Giving

Company Overview

A boutique financial services firm specializing in personalized wealth management for high-net-worth individuals and families. The firm blends strategic asset growth, legacy planning, and philanthropic advising—offering white-glove service rooted in long-term client relationships, discretion, and impact-driven financial strategies.

The Challenge

The firm's legacy donation platform came with high fees, rigid workflows, and an impersonal user experience—making charitable giving feel transactional instead of meaningful. To better serve their clients, they needed a flexible, transparent solution tailored to values-based philanthropy.

The Approach

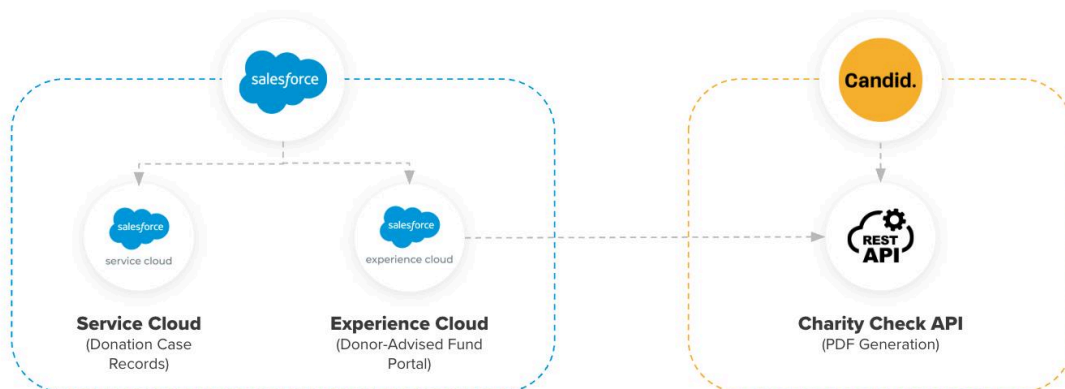
In partnership with LaunchPad Lab, the firm built a custom philanthropic fund on Salesforce Experience Cloud featuring client dashboards, real-time alerts, charity data via Candid API, document automation, and compliance tracking. Agile development enabled rapid delivery with early focus on integration, automation, and security.

Pain Points

- ✗ High Transaction Fees
- ✗ Rigid Donation Workflows
- ✗ Impersonal User Experience
- ✗ Manual Administrative Processes
- ✗ Limited System Flexibility

Product Requirements

- ✓ Custom Donor Dashboards
- ✓ Charity Data Integration
- ✓ Document Automation
- ✓ Compliance Tracking
- ✓ Multi-Factor Authentication



Driving Efficiency, Transparency, and Growth in Philanthropy

The Solution

The wealth management firm has a fully integrated, user-friendly platform that replaces the historic donation system with a more cost-effective and personalized alternative. The new enhancements include:



Seamless User Experience: Clients can explore charities, track donation history, and generate giving-related documents with ease.



Cost Savings: By eliminating the legacy system's transaction fees, the platform directly benefits donors.



Enhanced Transparency: Real-time visibility into donation history and charity information fosters trust and engagement.



Full-Service Philanthropy: The platform extends the firm's offerings, reinforcing its commitment to personalized wealth management.

The Results

With a custom Salesforce platform powering philanthropic giving, the firm unlocked significant operational and client experience gains:

- ✓ **Automated Manual Processes**
- ✓ **Reduced Transaction Fees**
- ✓ **Improved User Experience**
- ✓ **Enhanced Donation Transparency**
- ✓ **Improved Compliance & Security**

3-Month

Go-to-Market Timeline

