



Purpose-Built Intelligence for Capital Markets Distribution

Activate your data. Skyrocket your ROI.

Centersky delivers fully integrated, day-to-day Salesforce support for capital markets distribution teams — managing and enhancing your licensed Salesforce environment from the ground up.

Salesforce + Centersky = Your Competitive Intelligence Engine

As a dedicated Salesforce partner, we focus 100% on capital markets distribution — from alternatives to traditional asset management. Your distribution team doesn't just compete — it shines.

20+

Years of Capital Markets
Expertise

100%

Distribution
Focus



THE CHALLENGE FACING YOUR DISTRIBUTION TEAM



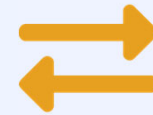
Data Quality Problem

You're collecting advisor registration data, sales data, activity data, and more — but it's siloed, stale, and never operationalized. Poor data quality has your team stuck in the digital mud, working harder not smarter.



Data Quantity Problem

You only see the data you already own. Without actively maintained and curated third-party data sources, you're missing advisor transitions, capital movement, and competitive intel your rivals may already be acting on.



Data Organization Problem

Unorganized data can't power agentic workflows. Without a purpose-built intelligence layer, your Salesforce is a filing cabinet — not a revenue engine.

Solve this digital three-body problem and you unlock your data and your team's full potential.

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OUR STORY

We Saw This Coming

In 2006, Gary Davi became CTO of an alternative investment sponsor — and saw the data problem firsthand. Nine years later, he founded Centersky to solve it. Built from the inside out.

The industry is still catching up. We've been proven right.



2006

Gary Davi becomes CTO of an Alt Investment Sponsor — the data problem is immediate and obvious



2015

Centersky founded — built from 9 years of living the problem firsthand



2022

AI R&D team formed



Today

Leading capital markets distribution focused Salesforce experts



We bring the methodology.

The payoff: every FTE closes more, covers more, and outpaces the market.

Built on Data Quality + Data Quantity + Data Organization — layered directly into your existing Salesforce org.

1	Data Integrity	The foundation upon which everything else is built. Without a clean, duplicate-free foundation, everything built on this data will be limited.
2	Data Enrichment	Trusted third-party feeds layered in — Fintx, Advisor Pro, SS&C WalletShare, Dakota and more — constantly updated, automatically synced.
3	Wisdom Layer	All data sources married into a single, unified contact record inside your Salesforce org. Your data + market data = the deepest advisor view in the industry.
4	Alert-Centric Environment	Take the wisdom layer and make it actionable. Like whack-a-mole for wholesalers — reports, list views, email alerts, and custom components that surface what matters most.
5	Agentforce AI — Agentic	Business AI informed by 20 years of capital markets best practices — trained on your products, KPIs, compliance, and distribution strategy. Your Agentforce understands your business from day one. Each FTE sharper, faster, and closing more.
6	Agentic Expansion	AI expands beyond assistive chat — triggering targeted email journeys, processing documents, mobile briefings, note taking, interaction analysis, sales coaching, and much more.

THE CENTERSKY DIFFERENCE

	Generic Salesforce	Centersky
Blind Spot Detection	<i>Manual, after the fact</i>	✓ Real-time alerts: fallen angels, firms in motion, one-ticket wonders
Data Maintenance	<i>Manual, duplicates, clunky</i>	✓ Single click workflow enhancements, unique identifier driven deduplication
Sales Workflow	<i>Generic tasks & dashboards</i>	✓ Alert-centric environment built for capital markets distribution
AI / Agentforce	<i>Default agents, no domain fit</i>	✓ KPI-trained agents tuned to your products, compliance & strategy
Advisor Intelligence	<i>Manually maintained, stale, basic</i>	✓ Advanced, big data + your data capabilities — deepest advisor view possible



CORE CAPABILITIES

The trifecta that powers agentic AI — and more revenue per FTE.

Blind Spot Detection

Surface missed advisors, at-risk producers, and fallen angels — agentic alerts that trigger the right action at the right time, without a wholesaler having to search.

Agentforce AI / KPI-Trained

AI co-pilots trained on your products, compliance, and KPIs. Your wholesalers' precision edge — every FTE focused, efficient, and closing more.

Advisor Intelligence

Your data + data provider (Advisor Pro, Fintrx, Dakota, SS&C WalletShare subscription) = the deepest, cleanest advisor picture in the industry.

Prospect-to-Producer

Automated agentic nurturing that converts one-ticket wonders and fallen angels into active producers — more revenue from your existing team.

Money & Reps in Motion

Track advisor transitions and capital movement in real time. Segment investor types to enhance reversion capital upon fund liquidations.

Conference ROI Intelligence

Pre/post campaign tracking, attendee attribution, and real-time pipeline impact. Know whether your T&E and firm support spend is generating a true ROI.



WHY CENTERSKY

Service as Software. Your expertise-driven competitive edge.



Ecosystem Connectivity

We connect your salespeople, advisors, advisor firms, dealer managers, sponsors, transfer agents, order entry, and cash management — in one platform.



Operational Efficiency

Do more with your existing team. Centersky automates the manual, surfaces what matters, and empowers every wholesaler to operate at their highest level.



The Expertise is the Product

Generic AI gives generic answers. Our team knows how to ask the right questions — trained on 20 years of capital markets expertise so your Agentforce delivers precise, actionable intelligence instead of noise. Service as Software.



Smart Lead Generation

Make follow-ups timely, efficient, and effective. Smart lead generation ensures no opportunity falls through the cracks.



T&E & Firm Support ROI

Know whether your travel, entertainment, and firm support spending is generating a real return. Measure what matters.



Data Into Knowledge

Segment investor types for reversion capital on fund liquidations. Turn raw data into actionable knowledge that drives decisions.



Your Wholesalers, Augmented by AI.

Most firms deploy generic AI. Centersky builds agentic workflows trained on your KPIs, products, compliance, and the full intelligence stack — so your AI acts on data, not just reports on it. The result: each FTE on your team becomes sharper, more focused, and more effective — generating more revenue without adding headcount.



Agentic co-pilots trained on your KPIs, products & compliance — not generic AI



Alert-driven agentic workflows — wholesalers act on signals, not spreadsheets



Pre and post meeting AI briefs, automated follow-ups — every FTE walks in prepared and follows up fast



Automated segmentation and targeted outreach — each FTE reaches the right advisor at the right time

“Data Quality + Data Quantity + Data Organization — the foundation. Agentic AI — the payoff.”



WHAT YOU GET WITH CENTERSKY

Fully Integrated Solution

- ✓ Purpose-built Salesforce implementation for capital markets distribution teams
- ✓ Day-to-day support of your Salesforce environment — not just a setup and goodbye
- ✓ Salesforce Marketing Cloud, Pardot & Marketo integration
- ✓ Data integrity focus
- ✓ Agentic innovation with capital markets in mind
- ✓ Conference ROI tracking and campaign attribution

Our Support Model



Your Salesforce, Managed

We manage updates, optimization, and platform health within your licensed Salesforce environment so your team stays focused on distribution.



AI Governance

We certify and maintain your Agentforce agents — keeping them compliant and effective.



Strategic Partnership

We're not a vendor. We're embedded in how your team operates, with the domain knowledge to prove it.



READY TO ACTIVATE YOUR DATA?

Strengthen your data. Center your focus.

Centersky is the trusted partner for capital markets distribution teams. Our years of experience and industry focus are a powerful combination. If you're ready to turn your data into your most powerful distribution weapon — let's talk.

[centersky.net](https://www.centersky.net)

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Years. One Focus.

100%

Distribution Focus

