



Arcus Partners Announces Bulltick's Selection of Finity360 to Enhance Digital Workflows and Centralized Data Management

"Leading investment firm Bulltick chooses Finity360 to streamline operations, optimize data management, and enhance digital workflows."

PHILADELPHIA, PA, UNITED STATES, March 6, 2025 /EINPresswire.com/ -- Arcus Partners Announces Bulltick's Selection of Finity360 to Enhance Digital Workflows and Centralized Data Management

Arcus Partners™, a leading WealthTech and Managed Services provider for SME Wealth Management, RIA, and Broker-Dealer firms is pleased to announce that Bulltick, an international financial and wealth services firm supporting ultra-high net worth private clients and financial institutions, has selected Finity360 as its Salesforce-native solution to modernize and streamline its middle-office operations. The implementation will begin with Finity360 DOCS, a robust, digital document management application designed to bring greater efficiency, automation, and seamless data accessibility.

For over 25 years, Bulltick has built a reputation for integrating local expertise with a global platform, serving a diverse client base that includes pension funds, banks, broker-dealers, asset managers, high-net-worth individuals, family offices, insurance companies, investment advisors, and funds primarily across Latin America.

As part of its digital transformation initiative, Bulltick is leveraging Finity360, a native Salesforce suite of applications, to optimize workflows, consolidate business-critical data, and create a more connected digital ecosystem. By implementing Finity360 DOCS, Bulltick will provide its various teams, compliance, advisors, and management with a centralized platform for document management, reducing inefficiencies and improving collaboration across the organization.

Finity360 DOCS simplifies document workflows by enabling seamless capture, organization, and retrieval of files within Salesforce, reducing the need for multiple, disconnected systems. Built on AWS secure storage and AI-driven automation, the solution will help Bulltick advisors and operations teams access key information faster, launch workflows more efficiently, and enhance overall service delivery.

"Wealth Management, RIA and BD firms today need more than just compliance tools—they need

technology that truly integrates with their existing platforms, eliminating inefficiencies and giving teams access to the data they need, when they need it," said Gerry Murphy, CEO of Arcus Partners. "Bulltick's adoption of Finity360 represents a major step forward in modernizing their workflows and reducing operational silos. We are excited to support their transformation and ensure they maximize the value of Salesforce within their firm."

Juan Vallejo, Chief Digital Officer at Bulltick, emphasized the impact of centralizing workflows and data:

"By implementing Finity360, we will be unifying our document and data management within Salesforce, creating a more seamless, secure and intuitive workflow. This transformation not only optimizes internal processes but also enhances client interactions by allowing our teams to dedicate more time to strategic engagement. Arcus Partners brings a solution that we believe aligns

very well with our long-term digital vision, reinforcing our commitment to a more digital, agile and connected organization."

As Bulltick continues to adopt additional Finity360 capabilities, the firm expects to further enhance its advisor experience, optimize data accessibility, and drive continued innovation in its client services.

For more information about Finity360 and how it transforms Salesforce for financial services firms, visit www.arcuspartners.com.

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About Arcus Partners

Arcus Partners is a leading provider of AI-driven financial technology solutions designed to enhance efficiency, optimize data management, and streamline workflows for financial institutions. With the Finity360 suite, SYNTHIFY, and ArcusX AI, Arcus Partners delivers solutions that empower SME firms to digitally transform their operations, centralize critical business information, and improve collaboration across teams.

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