

# Pulse360 and Wealthbox Unveil Dynamic SmartFields, Revolutionizing Wealth Management Operations

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Pulse360, a leader in innovative wealth management solutions, is proud to announce the launch of its groundbreaking feature, Dynamic SmartFields. Designed to revolutionize how financial advisors interact with client data, this first-of-its-kind feature enables advisors to seamlessly pull critical data from third-party software directly into their client documents with just a few clicks.

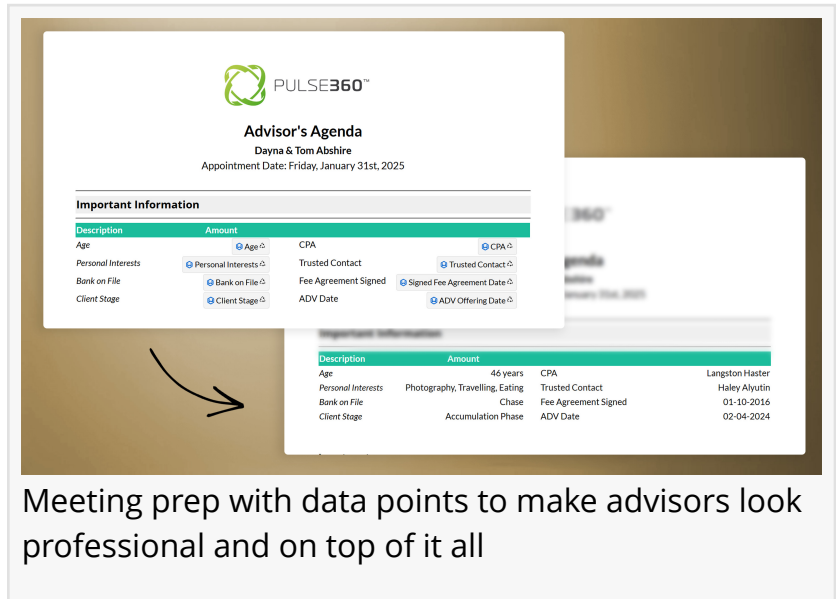
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The expansion of Dynamic SmartFields to Wealthbox represents a significant milestone in streamlining how advisors interact with client data”

*Anand Sheth, CEO of Pulse360*

This marks the second integration of Pulse360’s Dynamic SmartFields, now extending its powerful capabilities to Wealthbox CRM. The first integration, with Holistiplan, laid the groundwork—this latest collaboration propels the industry toward seamless automation. With Dynamic SmartFields, financial advisors can now pull critical data points from Wealthbox—such as client attorney names, custom fields, and more—directly into the Pulse360 platform, eliminating the inefficiency of switching between

systems. Three years in the making, this integration reinforces Pulse360's unwavering commitment to innovation and operational excellence.



The screenshot displays the Pulse360 'Advisor's Agenda' interface for Dayna & Tom Abshire, with an appointment date of Friday, January 31st, 2025. It features two tables of 'Important Information' with columns for Description and Amount. The top table lists fields like Age, Personal Interests, Bank on File, Client Stage, CPA, Trusted Contact, Fee Agreement Signed, and ADV Date. The bottom table shows populated data for a client named Langston Haster, including Age (46 years), Personal Interests (Photography, Travelling, Eating), Bank on File (Chase), Client Stage (Accumulation Phase), CPA, Trusted Contact (Haley Ayutin), Fee Agreement Signed (01-10-2016), and ADV Date (02-04-2024). A curved arrow points from the top table to the bottom table, illustrating the data integration.

Meeting prep with data points to make advisors look professional and on top of it all

Quote from Anand Sheth, CEO of Pulse360:

"The expansion of Dynamic SmartFields to Wealthbox represents a significant milestone in streamlining how advisors interact with client data. At Pulse360, our mission is to free financial advisors from technological friction, allowing them to focus on what matters most—their clients. This integration is another step toward a future where intelligent, connected tools drive efficiency, scalability, and an exceptional client experience"

Quote from Jeff Mello, President & CFO of Wealthbox:

"At Wealthbox, we're committed to helping financial advisors streamline operations and simplify their workflows through modern CRM technology. This integration is an advancement in reducing administrative complexity, enabling advisors to operate more efficiently and drive greater value for their clients."

Dynamic SmartFields streamlines complex workflows, minimizes administrative overhead, and enhances data accuracy—directly boosting the productivity and profitability of financial advisory firms. By pulling critical client data directly from Wealthbox, advisors eliminate time-consuming copy-paste tasks and the risk of manual errors. This means less administrative burden and more time for meaningful client interactions.

One key use case is meeting preparation. With Dynamic SmartFields, advisors can effortlessly access up-to-date client details—such as attorney names, custom fields, and other vital information—without tedious data entry. This ensures they walk into every client meeting fully prepared, allowing their team to focus on strategy and service rather than manual busywork.

The integration with Wealthbox CRM marks another milestone in Pulse360's vision of a connected advisory ecosystem. With plans to expand Dynamic SmartFields to additional platforms, Pulse360 is committed to creating a seamless, intelligent network that empowers wealth management professionals to operate at their best.

#### About Pulse360

Pulse360, a 2024 AdviceTech Live Community Award recipient, a 2021 & 2023 Wealthmanagement.com Industry Awards Finalist, was created to make financial advisors at least 50% more productive. Our remote-ready SaaS suite can make every aspect of fiduciary meeting prep and documentation 10X more efficient. The Company was founded in 2019 by Anand Sheth and James Hill. The Company is headquartered in Riverside, CA.

#### About Wealthbox

Wealthbox® is a CRM platform for financial advisors. Integrated with leading custodians and wealthtech partners, Wealthbox is known for its modern product design and powerful yet intuitive user experience. The collaborative workspace technology allows financial advisors, enterprise RIA firms, and broker-dealers to manage client relationships and streamline operations to grow their practices. Learn more at [www.wealthbox.com](http://www.wealthbox.com).

For more information about Dynamic SmartFields or to schedule a demo, visit

<https://www.pulse360.com>

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