



CRM Comparison

	Financial Services Cloud	Wealthbox	Redtail
Monthly Cost	\$150+ per user	\$65 max per user	\$99 for up to 15 users with add-ons available for an extra cost
Document Storage	Can store documents but it appears you cannot associate PDFs to contact records, households, etc.	Can store documents and associate to contact records, households, etc.	+\$49 per month for 10G Storage (Redtail Imaging); I don't know if you can associate documents to contact records, households, etc.
Custom Notes	Yes; can be associated with contact records, etc.	Yes; can be associated with contact records, etc.	Yes; can be associated with contact records, etc.
Individual Tasks	Yes; can be associated with contact records.	Yes; can be associated with contact records, households, etc.	Yes; can be associated with contact records, households, etc.
Checklists (Workflows)	Requires add-on for additional fee.	Yes; can be associated with contact records, households, etc.	Yes; can be associated with contact records, households, etc.
Send Emails	Unknown	Yes; can be associated with contact records, households, etc.	Yes; can be associated with contact records, households, etc.
Track Opportunities	Yes; Extremely robust.	Yes	Yes
Track AUM	Yes	Via Integration	Via Integration
Mobile Application	Yes	Yes	Yes
Calendar Syncing	Yes	Yes	Yes
Business Analytics	Yes; Extremely Robust	Yes	Yes
Reporting	Yes	Yes	Yes
Search	Search all objects, notes, etc. from the main menu.	Search objects from main menu, search notes and files from object	Search objects from main menu, search notes and files from object

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Third-Party Integrations	Robust	Moderate	Limited
Native Integrations	Robust but each costs extra	Robust	Moderate
Zapier Integration	Robust	Moderate	Limited
G2 Rating	4 / 5	4.5 / 5	4.5 / 5
Ease of Setup Per G2	7.4 / 10	Not enough data	8.9 / 10
Ease of Use Per G2	7.9 / 10	9.3 / 10	8.8 / 10
Quality of Support Per G2	7.9 / 10	8.8 / 10	9.1 / 10
Best For (Firm Size)	Enterprise	Small to Mid-Size	Small to Mid-Size
Best Feature	Robust analytics and breadth of features.	Contains 95% of what any firm would need to run efficiently while also being extremely user-friendly and cost-friendly	Internal automations are fantastic
Worst Drawback	Overwhelming amount of options for customization and high cost.	Issues with syncing Outlook calendar	Lack of third-party integrations and Zapier triggers / actions. Does not play well with others.

Outcome:

Wealthbox is going to meet 95% of your needs well, and though there are additional software systems you can supplement to get better functionality if you want an easy-to-use, all-in-one system that functions with minimal setup it's your best option.

Salesforce is great if you have an enterprise-level firm and need to do cross-channel analytics but it's probably overkill for a small firm based on time, effort and cost to set up AND learn.

Redtail has great internal features but doesn't play well with other software so for automating your workflows it's not a good option. In addition, cost increases with additional features added.