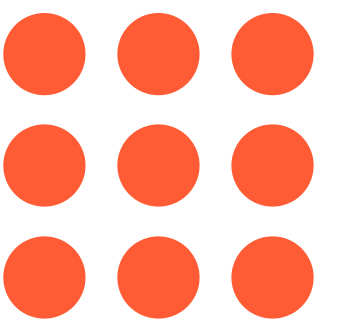


HubSpot for Financial Services



Why HubSpot?

HubSpot's AI-powered customer platform provides an **easy, fast, and unified** way to automate outreach, drive acquisition, and nurture relationships.

Traditional CRM

- Hard to Use**
 Reliance on specialized labor due to hard to use tools.
- Slow Results**
 Inefficiency that slow time to value.
- Disjointed Data**
 Complex operations that introduce risk.



Customer platform

- Easy to use**
 Easy to use tools that empower teams.
- Fast results**
 Fast results powered by AI that reduce time to value.
- Unified data**
 Unified customer platform that simplifies operations.

Automate Outreach

Streamline processes to focus on high-value actions and boost productivity

Drive Acquisition

Leverage customer intelligence to target highly qualified accounts and expand growth

Nurture Relationships

Tailor content to give delightful experiences that keep customers engaged

See how businesses in the financial services industry are growing with HubSpot

+245%

More website traffic

+98%

More deals closed

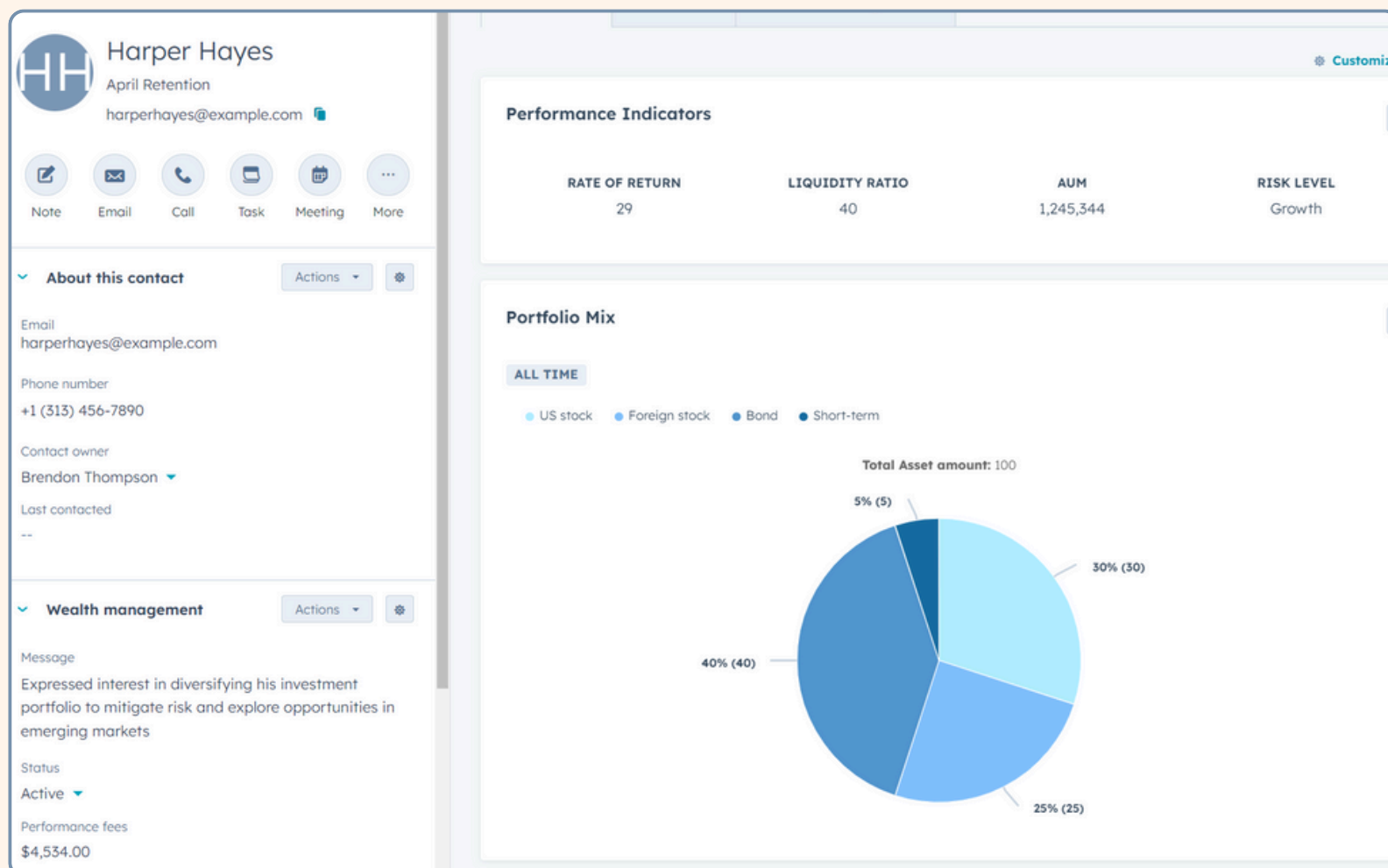
+310%

More inbound leads

“This holistic solution has provided our Investor Solutions team at The Motley Fool the ability to meet our members when they need us most to drive both greater understanding of what they have purchased and how best to utilize their subscriptions to meet their personal investment goals.”

BRIAN C. SILENGO
 Vice President, Revenue & Member Experience
[The Motley Fool](#)





Work Easier

HubSpot offers easy-to-use and customizable features that can be tailored to your business requirements, such as custom objects, CRM cards, and task management tools.

[See all features once.](#)

Grow Faster

Utilize features like AI assistants, advanced reporting, and data sets to access real-time insights and track revenue trends effectively, enabling you to easily adapt to emerging trends.

[See all features once.](#)



Audit Logs
View user actions taken in your HubSpot account over the last 90 days.

Events | Analytics

Category: Security Activity | Subcategory: All | Action: All | Modified by: Anyone | Date: MM/DD

CATEGORY	SUBCATEGORY	ACTION	MODIFIED BY
Security Activity	Add user	Create	Amy Chamness
Security Activity	Add user	Create	Amy Chamness
Security Activity	Add user	Create	Amy Chamness
Security Activity	Remove admin permissions	Update	Amy Chamness

Simplify Operations

Work confidently with built-in risk management features like audit logs, security center, and user permissions to safeguard client data effectively.

[See all features once.](#)

Create sustained growth for customers

Learn more about how HubSpot's AI-powered customer platform is built to solve the needs of businesses who offer financial services.



[Book a Demo](#)

[Learn More](#)