

The Ultimate Compliant Texting Solution for Home Offices

Client Communication, Revolutionized



User-Friendly:
Designed for easy adoption by advisors



FINRA and SEC Compliant:
Monitor and retain all messages effectively



CRM Integration:
Sync with major CRMs for comprehensive record-keeping



Robust Security:
Messages encrypted in transit and at rest

Our Game-Changing Features



- ✓ Templated Messaging
- ✓ Automatic Responses
- ✓ Broadcast Messaging
- ✓ Instant Archiving
- ✓ Data Loss Prevention (DLP)
- ✓ Auto-forwarding of Office Numbers
- ✓ Contact Import and CRM Syncing
- ✓ Customizable Compliance Dashboard
- ✓ Enterprise Internal Messaging
- ✓ Multi-factor Authentication
- ✓ SAML Integration Available
- ✓ Scheduling for Future Message Delivery
- ✓ File Sharing (images, videos, documents)
- ✓ Group Texting* *Coming Soon*
- ✓ Mobile Application Management (MAM)* *Coming Soon*

We Partner with Industry Leaders

 LPL Financial



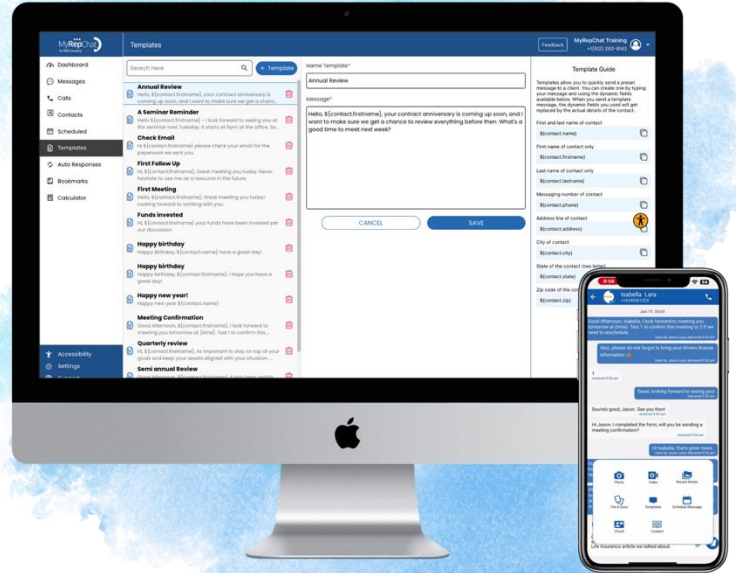
 Cetera[®]
FINANCIAL GROUP

 CAMBRIDGE

...And many more!

Why MyRepChat for your Firm?

- MyRepChat enhances client engagement with secure texting, boasting a **98% read rate within 3 minutes.**
- Seamlessly integrates with popular CRM systems, centralizing communication **and boosting productivity.**
- Advanced analytics provide valuable insights on interactions and advisor performance, enabling **data-driven strategy refinement.**



Seamless Onboarding



No Heavy Lift

MyRepChat ensures a smooth, rapid rollout with an average go-live timeframe of just 60 days



Compliance Approved

We closely track regulations, implementing features that satisfy oversight requirements and simplify audits



Economies of Scale

Our simple, industry-leading rates encourage growth without hidden fees or penalties for success



Dedicated Support

We deliver personalized, ongoing support to enterprise clients through tailored success plans, targeted interactions, and usage analytics

Case Study: Validating Ease of Adoption

Our recent case study of a 100-person organization shows MyRepChat's impressive ease of adoption and value across advisors, support, and compliance teams.

51%

Advisor platform adoption surged by **over 50%** compared to the previous year.

147%

Texting volume skyrocketed by **147%** in 2023, with nearly 30,000 messages exchanged—more than doubling the previous year's activity.

Ready to get started?

Email us at enterprise@myrepchat.com to connect with one of our dedicated Solution Consultants