

Text Messaging with MyRepChat

Cetera has partnered with [MyRepChat](#) as our compliant text messaging provider. MyRepChat is unique to this space as the only text messaging solution that was created and designed by a financial planner with a specific focus on the financial services industry.

MyRepChat gives you the ability to enhance your communication strategy:

- Create templates for commonly used messages
- Schedule messages in advance
- Integrate with MarketingCentral to share content via text message
- Integrate with your CRM platform

[MyRepChat Brochure](#) | [Recorded Demo of MyRepChat](#)

Frequently Asked Questions

How much does the texting platform cost?

The monthly subscription cost for MyRepChat is \$11 for Cetera-affiliated financial professionals. MyRepChat will collect your payment directly; you'll be prompted to add your payment method during the sign-up process. Cetera will not be involved in billing.

How do I get started?

To get started with MyRepChat, click [here](#) or contact 844.402.2428. Be sure to let them know your specific broker-dealer affiliation.

What should be included on my virtual business card (vCard)?

A vCard is required to have your MyRepChat account approved by Advertising Review once created. You must send the vCard out on your initial text with a contact.

The virtual business card you can set up under MyRepChat's Settings > Profile menu serves as an electronic format of your paper business card. We recommend you include all information that you're prompted to personalize (name, company name, title, email, address, phone number). You will also be required to enter your broker-dealer's disclosure in the notes section—this will be the same as what appears on either your approved email signature block or printed business card.

Can my Admin use MyRepChat?

Yes, there are two options for Admins use of MyRepChat:

1. Admins can be set up with an additional login to access the registered representative's account. This service is included with the \$11 monthly subscription fee. However, the vCard should reflect the registered representative's name as it is essentially his/her business card. If sending messages, the admin must end with a signature to identify him/herself (i.e., from John, Administrative Assistant to Jane, your Financial Professional).
2. Admins are permitted to have their own account which will incur the normal \$11 monthly subscription fee. They must also have a vCard to have their account approved by Advertising Review once created.

Can I send pictures to my clients or receive pictures my client sends?

Photos and PDFs may be sent via the MyRepChat mobile application. While MyRepChat is a secure application, you should always be cautious when sending, receiving, and storing personally identifiable information (PII). PII should never be saved to the local or cloud storage of your device.

Can I text multiple phone numbers or groups?

You can text up to 25 contacts at one time. The contact receives an individual message; there is no group message functionality. Please note: you are required to send communication to Advertising Review for approval if you plan to send the same message to more than 25 contacts in a 30-day period.

How long does it take to receive a text?

Texts are sent and received immediately once your MyRepChat account is set up and approved. The contact information on your account will route to Ad Review for approval in the MyRepChat platform.

Do templates saved in MyRepChat need to be reviewed by Advertising Review prior to use?

Yes. Please send any templates for text message communications to Advertising Review through your normal approval process prior to use.