

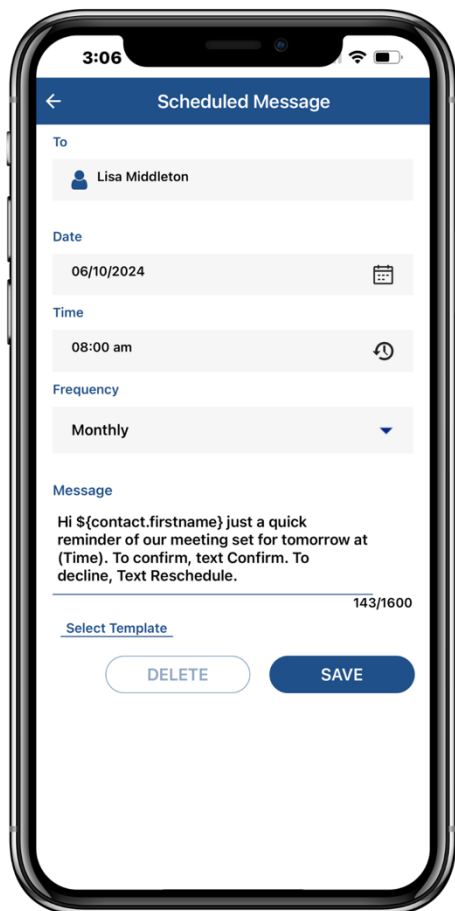
# myrechat

User Brochure



**Industry Leading, Compliant Solution to Text Messaging**

# myrepchat is a texting and communication platform designed for advisors.



myrepchat is a sophisticated text messaging platform designed specifically for financial advisors, balancing rapid client communication with strict compliance requirements.

Going beyond standard texting capabilities, the platform offers advanced features and integrations tailored to financial professionals' unique needs.

What sets myrepchat apart is its commitment to maintaining regulatory compliance while continuously evolving with industry standards.

Financial professionals can leverage myrepchat's comprehensive toolkit to ensure compliant client communications while streamlining their daily workflows through automated features and intuitive interfaces.

## Why Texting?



Texting is the fastest way to reach clients, and **over 90%** of all texts are read within 3 minutes<sup>1</sup>



**80%** of Americans would rather text than converse by phone<sup>2</sup>



Affluent investors expect to hear from clients frequently and text updates from advisors as their **#1** communication preference<sup>3</sup>



# Features and benefits

## Stay connected

Birthdays, anniversaries, events, appointments, and more! With our platform, clients will never have to download an app or software to communicate with you.

## Digital assistant

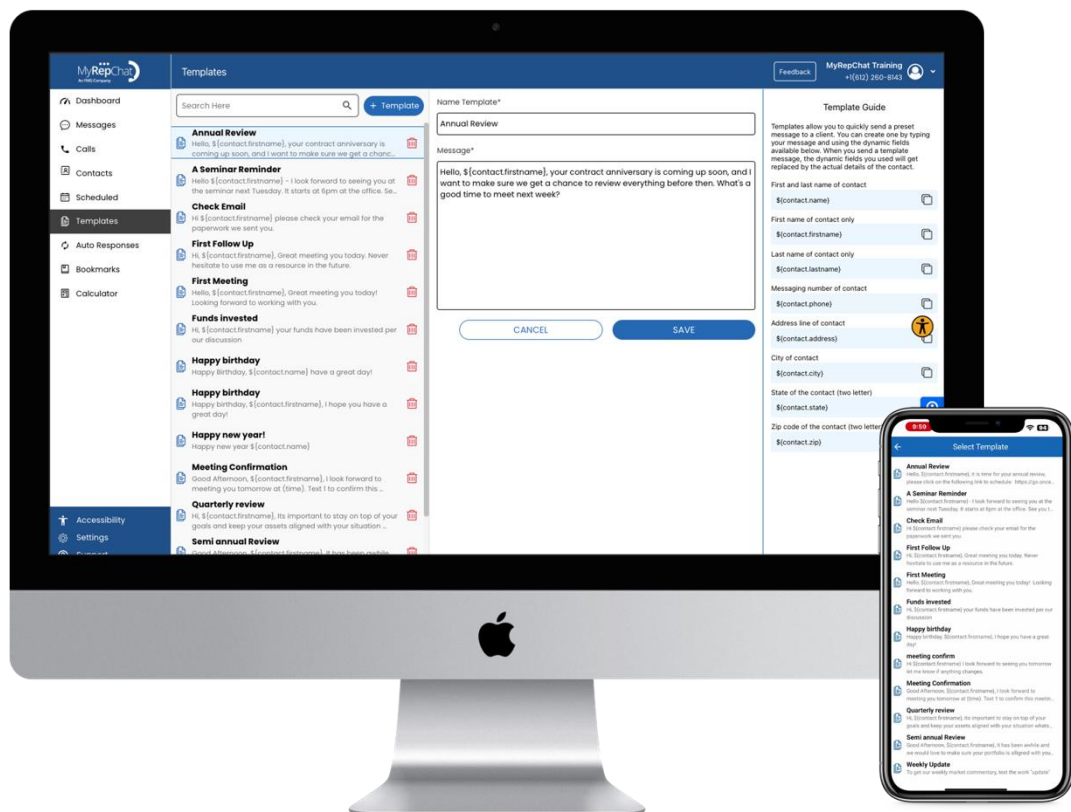
Scheduled, automated, and efficient client communication—leaving you more time to do what you do best.

## Documents and images

Sometimes clients choose to send things like documents, images, videos or even emojis through text. myrepchat supports this content inbound and outbound.

## Import your contacts

Effortlessly import our contacts from your CRM or mobile device to start texting right away. Our CRM integrations also ensure that your conversations are promptly archived for easy access.





# Features and benefits

## Keep your number

Did you know that **over 81% of clients mistakenly text their advisor's home office phone number?**<sup>1</sup>

You can keep your existing landline office number and have text messages enabled through myrepchat. Clients only need to know one number!

## Auto-forward

If you don't have a landline number to text enable, no problem! We can create a text number for you and auto-forward all calls to a number of your choice. You can change the number it forwards to at any time.

## Scheduling function

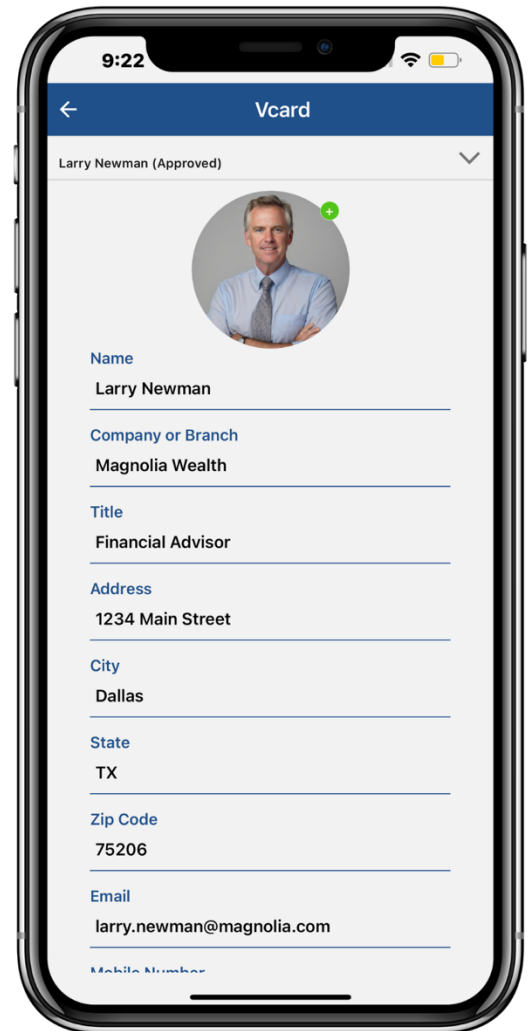
You can plan and schedule messages in the future and create recurring messages to celebrate important dates. Push send once and be worry-free while your marketing is executed!

## Virtual Business Card

With myrepchat, getting your contact information into the hands of your clients and prospects has never been easier. Your Virtual Business Card can be requested at will by clients and prospects, or you can hit one button and send it. The best way to ensure your business card is never lost is to make sure it is saved as a contact immediately.

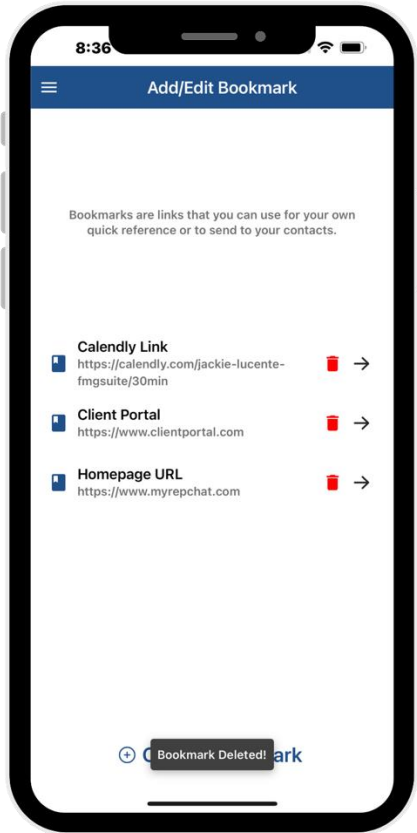
## Customizable workflows

myrepchat allows users to create customizable workflows. With these, a user can set their own rules to speed up the time it takes a client to receive a response. If a client texts a specific word or message, you can now track in your system to automatically respond with your desired message.





# Advantages of myrepchat



## Key advantages of our texting platform:

- Quick and easy way to connect and respond to clients
  - Personalized client communication
  - Streamline workflows with automated appointment reminders
  - Generate templated responses you can create, save and reuse!
  - Support staff management capabilities
  - Simple contact import and management
  - Message scheduling
  - One-click Virtual Business Card sharing
  - CRM conversation archiving
  - Customizable workflows
  - An easy marketing solution for client retention and prospecting
- .... **And more!**

## Texting is a power prospecting tool



According to MarketingCharts, the #1 activity on a smartphone is **messaging**<sup>1</sup>



An average person in the US only completes six phone calls per day, but **sends or receives 32 texts**<sup>2</sup>



The smartphone market in the United States is one of the world's largest, with over **310 million smartphone users as of 2023**<sup>3</sup>



Texting a prospect after initial contact can increase conversion rates **by 112.6%**<sup>4</sup>

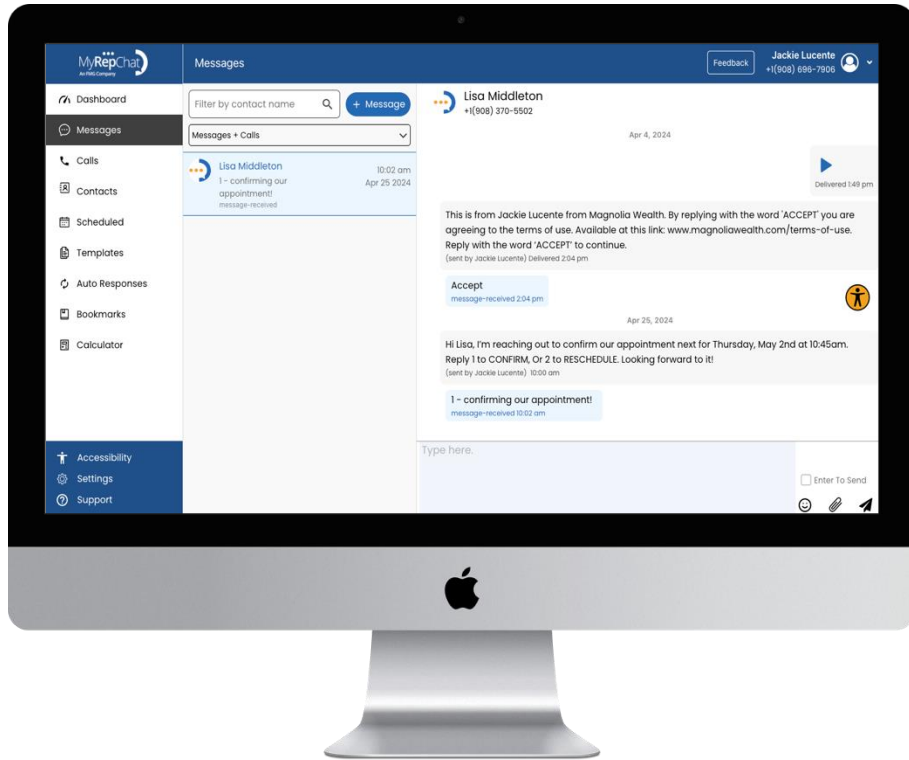


Sending 3 or more follow up text messages to prospects increases conversions by **as much as 328%**<sup>5</sup>



# Appointment scheduling, made easy

Texting is a reliable way to confirm appointments! Did you know that once an appointment is confirmed, **there's a 90% chance it won't be missed or rescheduled?**<sup>1</sup>



1. Juniper Research 2. The Advisor Coach



# Only 30-50%

of advisors confirm their appointments<sup>2</sup> which is why our automated appointment reminders can help you secure client appointments with ease.

# Stay connected with clients and exceed expectations

Regular client communication builds **trust and satisfaction**. In fact, **82% of clients expect an immediate response from businesses**<sup>1</sup>. Additionally, one of the biggest reasons clients leave their financial advisor is because of a lack of communication<sup>2</sup> so staying connected and responding promptly is most important.

A good marketing strategy and customer service model includes a healthy mix of text, email, calls, meetings, and events to see results. While email is an effective and professional way to communicate, the use of text messaging is the most convenient, quick, and reliable way to connect in the digital era. **In fact, 89% of consumers say they prefer texting with businesses over any other mode of communication**<sup>3</sup>.

## Texting: fast facts

### Text

95% of all text messages are read within 90 seconds (most are read in under 5 seconds)<sup>4</sup>

Text messages have a 98% open rate<sup>5</sup>

Text messaging is the #1 preferred form of communication<sup>6</sup>

Text messages exhibit an impressive response rate that surpasses phone calls and emails by 209%.<sup>7</sup>

### Email

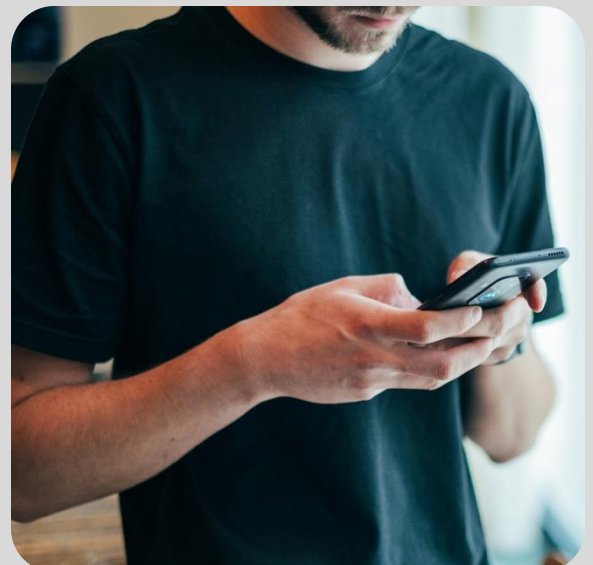
Email open rate for a Financial Advisor is 21.5%<sup>8</sup>

On average, it takes 90 minutes to respond to an email<sup>9</sup>

### Phone

Over 50 billion robocalls were received in the U.S. in 2022, up 12 percent from 2021<sup>10</sup>

90% of calls are not answered<sup>11</sup>

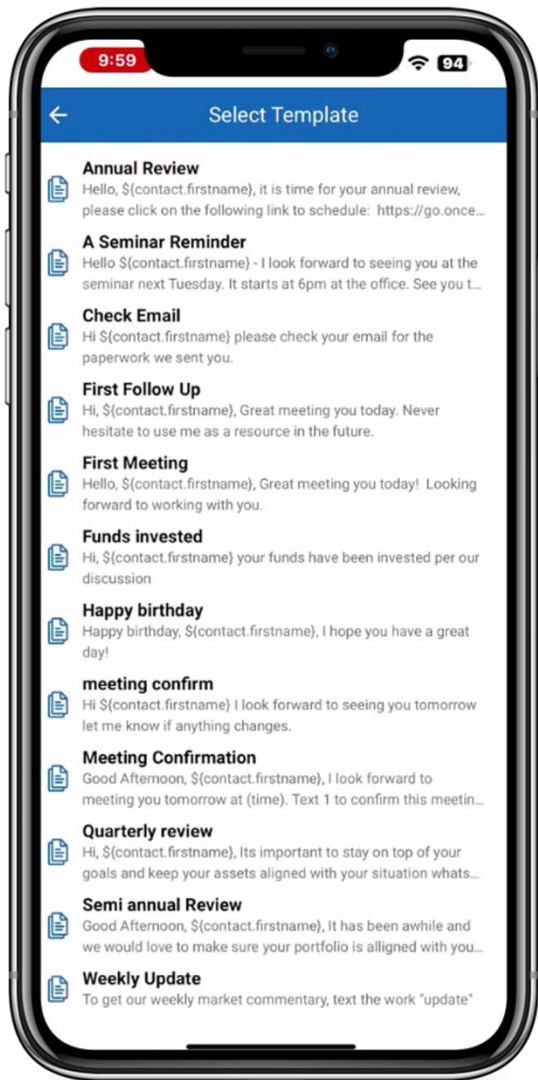




# Elevate your marketing strategy with text-messaging

## Automate and save time

myrepchat streamlines communication with automation features like appointment reminders, scheduled messages, and personalized templates, saving time and enhancing efficiency. Save time and focus on client relationships and personalized service, ensuring consistent and timely communication.



## Prospecting

### myrepchat is part of the FMG family:

Supercharge your business growth by combining myrepchat's secure messaging with FMG's marketing solutions. Engage clients and prospects through compliant communications while delivering targeted, personalized marketing campaigns. Track client interactions, share relevant content, and build stronger relationships through a seamless blend of secure messaging and strategic marketing tools.

## Virtual Business Cards

In a world where **88% of paper business cards are discarded within a week**, our built-in Virtual Business Card offers a smarter solution. Share your contact details instantly via text, making it effortless for clients and prospects to keep you top of mind.

## Risk assessments by text

Streamline your risk assessment process with our Nitrogen integration. Send questionnaires via text and instantly view client risk scores in myrepchat, enabling more efficient, personalized client guidance through a modern, convenient experience.







# Elevate your marketing strategy with text-messaging

## Broadcast messaging

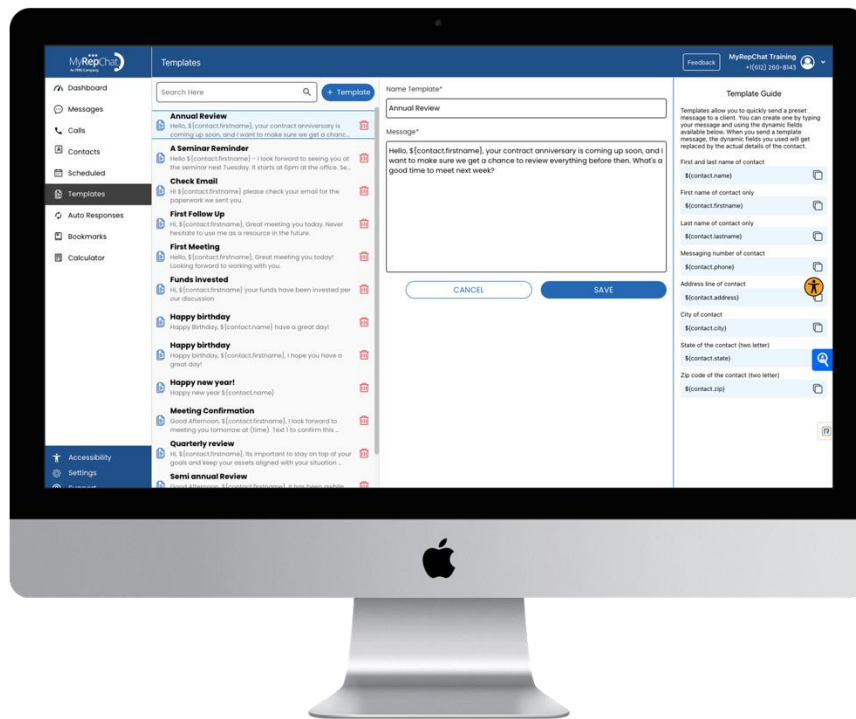
### Utilize distribution lists

In myrepchat, you can create groups called **Distribution Lists** to send messages to multiple recipients at once, enabling efficient communication with specific groups like clients, team members, or prospects for announcements, updates, or promotions. Distribution Lists allow you to send one message to multiple recipients as individual messages, saving time and streamlining mass communication.

## Free up time with templates

### Create, save, reuse

myrepchat's templates are pre-designed message formats that you can create and save for quick access when sending repetitive messages like appointment reminders, welcome messages or birthday wishes. You can easily select, customize, and send these templates, ensuring consistent and efficient communication.



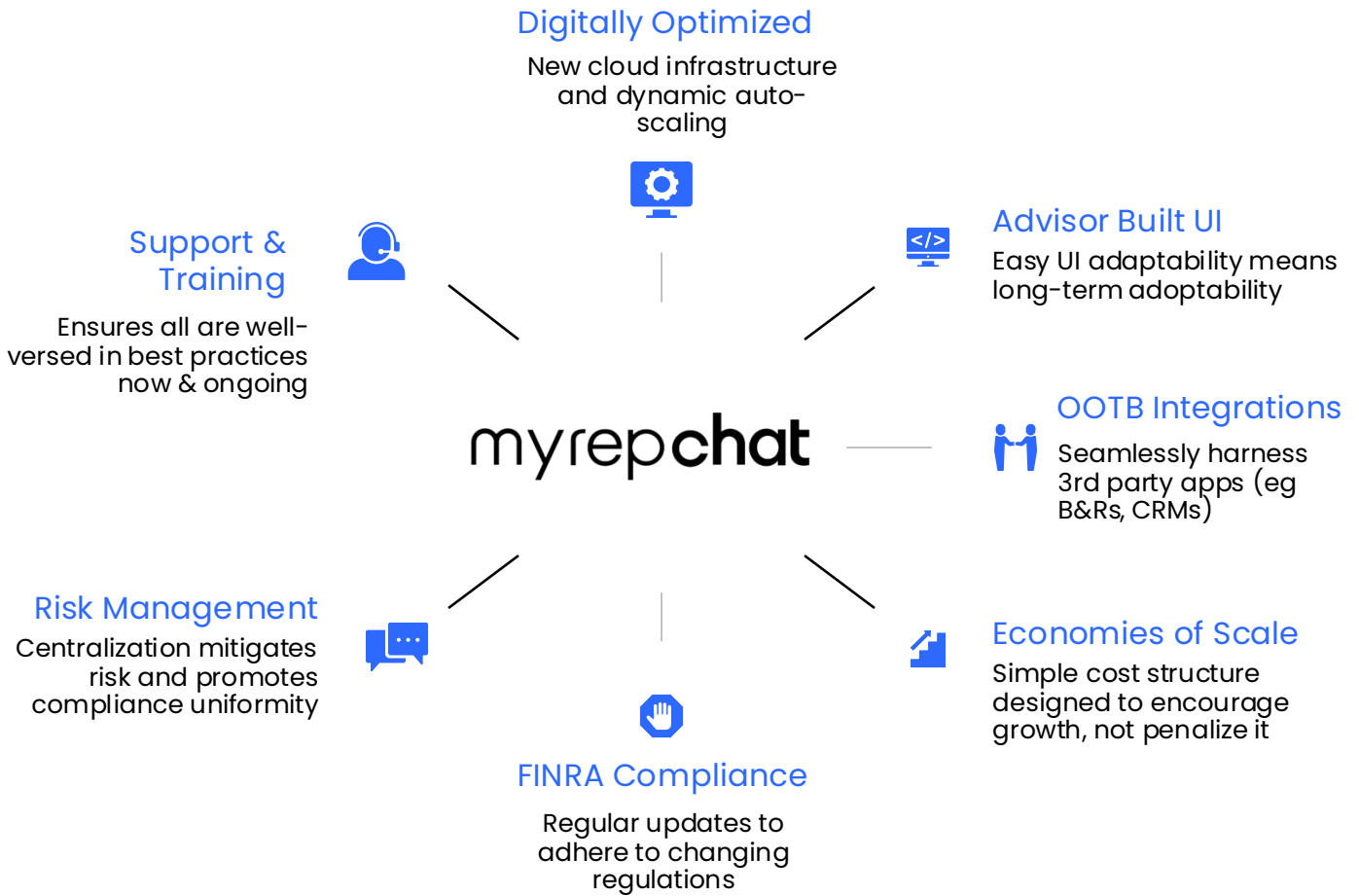
*Text is the way to go. It's easy and it doesn't take the time of an over the phone conversation.*

*– Erin F., myrepchat customer*



# Seamless connectivity

myrepchat integrations streamline onboarding by connecting with popular financial services tools, allowing you to import contacts, sync calendars, and transition smoothly with enhanced compatibility and usability.



## CRM integrations

Our CRM Integrations allow you to avoid the painstaking process of duplicating contacts and the time-sensitive process of storing notes. myrepchat's CRM integrations seamlessly sync client information and communication history, enhancing personalized interactions and client relationship management. This integration ensures easy access to all necessary client details, facilitating tailored financial advice and support while flawlessly integrating into your existing business operations.

## Archiving & partnerships

Discover how a partnership with myrepchat can grow your business. myrepchat seamlessly integrates with various organizations, ensuring the capture, review, and archiving of all myrepchat text messages. For the most current list of integration partners, please visit [www.myrepchat.com](http://www.myrepchat.com). We are constantly expanding our network of integration partners.

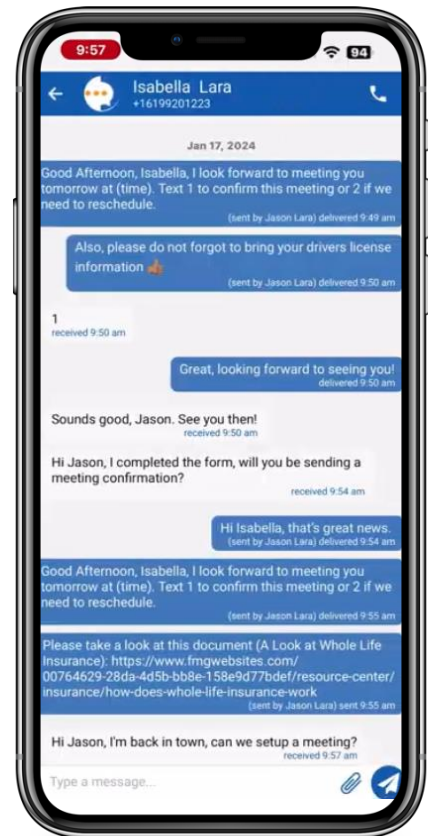


...and many more!



# We check all the boxes as the #1 compliant text messaging solution

- ✓ Can I use my office number for business texting?
- ✓ If not, can I have a number with my area code?
- ✓ Can the setup be fast and take no longer than a few minutes?
- ✓ Does it integrate with my CRM?
- ✓ Can my assistant log in using their own credentials?
- ✓ Can I schedule messages for varying frequencies?
- ✓ Does it have a Virtual Business Card?
- ✓ Can I create custom templates?
- ✓ Can I create custom auto-responses?
- ✓ Can I send and receive images and emojis?
- ✓ Can I send and receive documents?
- ✓ Can I make phone calls directly from the app?
- ✓ Can calls be recorded?
- ✓ Can recordings be transcribed?
- ✓ Is there an out-of-office feature?
- ✓ Can I update my billing in the app?
- ✓ Are my messages kept separate from others?



*The templates and the autoresponse are scheduled annually, like Happy New Year, Christmas, Happy Thanksgiving—everybody is so happy with that. But what I love most is just getting into the face of the client right there and then. I'm responding right away.*

– Jeanie S.

# Ready to sign up for the most reliable, versatile, and compliant texting solution out there?

1. Go to [www.myrepchat.com](http://www.myrepchat.com)
2. Click login/sign up in the upper right-hand corner
3. Select "Sign Up"
4. If you're part of a larger firm or organization who is utilizing myrepchat, at this step you can enter the 5-digit Group Code created for your organization. if you don't have your code, select the "Ask Us" button to email support for help
5. Take 5-8 minutes to let the setup guide walk you through creating your account!

Have any other questions? Email us at [\*\*info@myrepchat.com\*\*](mailto:info@myrepchat.com).