Provident Wealth Advisors, LLC use CellTrust SL2 to speed up client meeting confirmations and to keep their mobile communications compliant

"We made a great choice with CellTrust SL2 for our mobile communication compliance solution. It's affordable, easy to use, can be used on our financial advisors' personal mobile phones and gives me confidence that I have secured our firm's interest."

BABETTE SWITZER, COMMUNICATIONS DIRECTOR

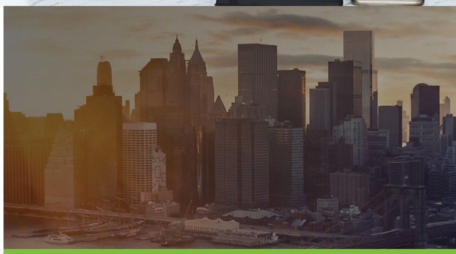
Case Study

Industry

Financial Services

Headquarters

The Woodlands, TX USA



Customer Objectives

We needed a compliant mobile communication solution for our financial advisors which was affordable, easy to use and all on one device.

Specific Challenges

Our advisors are often friends with their clients and even when they were following the "Don't text your clients" policy - their clients were texting or calling them on their personal mobile phones. There was no way to capture this information and we could have easily been out of compliance. We also had some people on iPhones and some on Android and we were asking ourselves what if one of our advisors left our firm? So, with all of these variables in mind, I started researching online to find a solution and discovered CellTrust.

Solution

- CellTrust SL2 domain provisioned in a multi-tenanted instance
- Multiple CellTrust Mobile Business Numbers (MBN)
- User Voice and Messaging
- Users APP to APP Calls and Group Chat Only
- Archiving configured to email journal to Communications Director

Results

In addition to our financial advisors and clients being able to communicate on their own mobile phones - we now use text messaging for client meeting confirmations. On average, it used to take 24-48 hours for our clients to respond to an email to confirm an appointment. Now we confirm all of our appointments the day before with CellTrust SL2 text messaging and we normally get a client response in seconds!

We also appreciate the SL2 desktop feature – texting on a cellphone is not as fast as typing it on a keyboard. It's been very easy to use, as the app itself is very intuitive, and CellTrust Professional Services gave us a tutorial. The hardest thing our advisors had to do was update their telephone number to the new SL2 Mobile Business Number. And if a financial advisor leaves the company, I can shut down the Mobile Business Number to their personal device and transfer it to another landline or mobile phone. At the end of every day I get an email archive journal of all SL2 mobile communication, so that if needed, I can provide it to our regulators.

Customer

Independent wealth management advisory based in The Woodlands, TX USA.

CellTrust

CellTrust is a global leader in enterprise mobile communications, compliance enforcement, traceability, eDiscovery and security, for highly regulated industries.

CellTrust's experienced team is ready to help you increase mobile client engagement and advisor productivity, while managing risk and enforcing regulatory compliance

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