CellTrust SL2™ SMB with Microsoft Purview Data Lifecycle Management

Mobile devices have made the world of business more connected and allowed professionals the freedom to work how and when they want. But for highly regulated industries like financial services, this freedom comes with its own set of challenges — as data becomes more dispersed it gets harder to comply with industry regulations that govern how client communications are monitored and archived. Organizations need a solution that keeps them in compliance without disrupting their workflow.

Streamline and automatically ensure compliance with a mobile communication and archiving solution
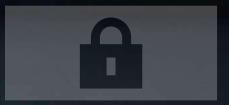
The financial industry faces strict regulations

Financial services organizations are required by US regulations to capture and archive client records for retention and eDiscovery. That's no small task when data is scattered across SMS, email, and social media channels as well as both company and personal devices and applications.

Convenience often comes at a cost

Most professionals prefer to use one device for both work and personal communications. Unfortunately, this creates privacy and logistical challenges for organizations that need to control how client data is shared and stored at all times.

Mobile data needs to be securely stored

Even after mobile data is captured, there is still the task of managing and archiving records to ensure regulatory compliance. However, as data grows in volume and complexity, the cost of storing these communications can quickly add up.

Ensure compliance out-of-the-box

Implement a solution ready to automatically capture the necessary calls, texts, images, and files from day one. Communicate with confidence knowing you are compliant with SEC, FINRA, and CFTC regulations.

Stay productive without introducing risk

Enable employees to use one device while keeping personal and business communications separate and secure. Stay compliant with a self-contained business environment, mobile business number (MBN), and communications channel.

Streamline data management and archival

Leverage the existing cloud storage available through your E5 license and SL2's built-in integrations with Data Lifecycle Management to quickly and easily transfer, manage, and store mobile data long-term all through the Microsoft environment you already know and love.

Microsoft Security

Confident, convenient, compliant communication that doesn't disrupt the user or client experience. Enjoy seamless capture and archival of all business-related mobile communications with SL2 and Data Lifecycle Management.

What our customers are saying

"CellTrust SL2™ has been a game changer for us in terms of productivity and compliance."

– Jennifer Angell, Financial Advisor And Director Of Operations, Payne Capital Management

Proprietary compliance solutions

SL2 contains CellTrust® Track, SecureVoice™, and SecureSMS™ technologies,[1] representing a portion of CellTrust's current international portfolio of 44 patents and 63 licensed patent rights. CellTrust is constantly innovating to bring new technologies to the mobile compliance space. [2]

Industry-recognized compliance technology

CellTrust has been repeatedly recognized by industry peers for its compliance technology. Most recently, CellTrust was a finalist Technology Provider in the REGTECH category for the 2022 US FinTech awards and a finalist Technology Provider in the COMPLIANCE category for the 2021 Wealthies awards.[3]

Built-in savings extends the value of your Microsoft 365 E5 license

For organizations with an existing Microsoft 365 E5 license, Microsoft Purview comes standard, eliminating the need to pay for an additional third-party cloud storage option for their archived mobile data. The seamless compatibility between SL2 and Data Lifecycle Management also saves valuable time for IT professionals needing to configure and contextualize the data before storage.

Seamless client experience

Clients can call and text their financial advisors via their MBN just as they would any phone number.

Compatible with WhatsApp and group messages

Employees can communicate as they normally would, leveraging True Group Messaging and built-in integrations with WhatsApp.

Full back-end control

Organizations maintain complete control of their SL2 users, including the ability to configure policies, wipe or transfer accounts, and monitor data as needed.

Find us on Microsoft AppSource

Schedule a demo

Learn more

CELLTRUST®
SECURE & COMPLIANT MOBILE

Microsoft Security

[1] SL2 Patents | CellTrust
[2] Patents & Rights | CellTrust
[3] Awards | CellTrust