



SL2™ Enterprise Capture Top Ten

- **1. Easy to stay compliant** with FINRA and SEC regulations.
- 2. Convenient organization and **separation of Business versus Personal** mobile communications.
- 3. You can SMS enable your existing office landline number.
- **4. Automatic Reply feature** allows you to automatically notify clients when you are unavailable, i.e., in a meeting, out of office, outside office hours.
- **5.** You can use the **same business phone number** on **multiple mobile devices** or from a web browser to send and receive messages and calls with clients, and they will all be captured for compliance.
- 6. Messaging Templates allow you to pre-define commonly used messages and send them quickly for more efficient messaging, i.e., disclaimer and consent configurations, sending a link to schedule a meeting, creating a link to a document in box[™], Microsoft OneDrive or another secure file sharing platform and sending.
- **7. Scheduled Messaging** feature allows you to send notifications of upcoming appointments.
- 8. Dispatch feature allows you to message multiple clients at one time without exposing their information to each other.
- 9. Add your signature with contact information and a scheduling link.
- **10.** Security: your communications are encrypted in transit and at rest.

Member of Microsoft Intelligent Security Association

Microsoft Security



FINRA | SEC | CFTC | DFA | GLBA | SOX | IIROC | FCA | MIFID | HIPAA | FOIA

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