



CellTrust SL2 helps AFS keep clients plugged into their financial advisory ecosystem with convenient, compliant text communication

“We used to have to reroute text messages from our clients when they came in because we had no way to archive them for compliance. Now that we have CellTrust SL2, our clients can communicate through the method they prefer - text. We are thrilled as it is working seamlessly, and we are communicating with them more than ever.”

SHON ANDERSON, CHIEF WEALTH STRATEGIST, ANDERSON FINANCIAL STRATEGIES (AFS)

Case Study

Industry

Financial Services

Headquarters

Dayton, Ohio USA

Customer Objectives

The advisory team at AFS combines industry best practices, leading-edge technology and professional human advice to provide a premium client experience. Frequent and open client communication is key to keeping their clients plugged into an ecosystem of financial advice designed to deliver confidence around their financial strategy. As the clients at AFS prefer text messaging, this requires a reliable, convenient and compliant communication channel.

Specific Challenges

Clients were text messaging AFS advisors on their personal mobile phones. To remain in compliance, these messages had to be rerouted to email or another auditable channel where content is archived. AFS advisors had to either carry two mobile devices or give out their personal mobile phone number.

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
- Configured for real-time capture in Smarsh Professional Archive

Results

SL2 separates personal and work activity at Anderson Financial Services on the same smartphone by deploying a separate Mobile Business Number™ (MBN). AFS changed their company signature to include their SL2 MBN, which has now become the company business number. AFS advisors can either text from the MBN directly from their personal smartphone or from their computer desktops or tablets.

In addition to empowering clients on their preferred communication channel and helping AFS deliver on its mission, SL2 has dramatically reduced response times. SL2 compliant text messaging is driving productivity with responsive communication at Anderson Financial Strategies while in the office or on the go.



Customer

Private wealth management and retirement plan consultancy on a mission to provide its clients with top quality financial expertise and rapid, responsive service through an honest relationship.

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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www.celltrust.com/SL2