

## SL2 helps Leverage Financial Advisory scale affordably at enterprise level

*“CellTrust SL2 was the most robust and yet affordable enterprise level compliant mobile communication solution I found. I wanted a platform that my company could grow with as I hire additional advisors. No one needs to buy a new phone; it works with an Android or an iPhone, is very flexible and allows for a small business to scale. The texting capture and archive functionality is really where the value is for me as all of my clients from ages 20 to 70 prefer to text!”*

**BRIAN BOND, FOUNDER AND INVESTMENT ADVISOR, LEVERAGE FINANCIAL ADVISORY**



## Case Study

### Industry

Financial Services

### Headquarters

Boston, Massachusetts USA

## Customer Objectives

Leverage Financial Advisory's process is 100% electronic. Each client has their own website where Leverage Financial Advisory aggregates and links their personal accounts, i.e., bank, student loans, investment, mortgage, automotive loan, insurance, life insurance, etc. and tracks all client spending. Every Saturday, clients get an update on how much they spent in the past week, how their investments are doing and the value of their net worth. Although today's technology has made investing in the stock market both easily accessible and inexpensive, clients often don't know where to start or who to trust and a high level of personal engagement is still required. Almost all of Leverage Financial Advisory's clients prefer text messaging as their primary communication channel.

### Specific Challenges

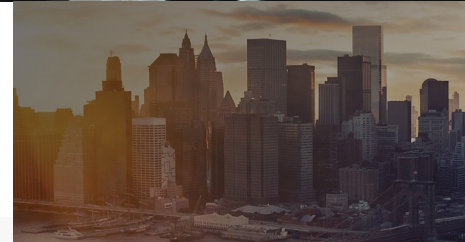
Text compliance soon became an issue for Brian and Leverage Financial Advisory as clients began asking if they could text his personal mobile number instead of sending him emails. This prompted him to quickly begin researching the market.

### 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 Custom Archive

### Results

Now, as a small business owner, all of Brian's clients have what they call their Leverage Number, which they now text or call when they want to communicate with him about their finances. The SL2 desktop version enables Brian to text from his computer or his phone and everything is synched. SL2 separates his business life from his personal life, essential for a small business owner – especially given that part of his pitch to his clients is they are never going to wait on hold – SL2 has helped him deliver on that promise. It also significantly reduces his response time while providing peace of mind knowing that all business related text messages are captured and auto-archived for e-discovery and compliance.



### Customer

Leverage Financial Advisory is a fee-only fiduciary investment advisory firm created to help ambitious mid-career and hotel professionals organize their financial lives, invest their savings, and reach their financial goals.

### 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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