

MyRepChat™



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A better client experience starts here.

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COMPLIANCE

ADVISOR

CLIENT



Why MyRepChat

Solutions to effectively and efficiently communicate with clients and prospects

In today's digital world, the ability to communicate with your clients through text message is integral to the client/advisor relationship. With MyRepChat, you can text message your clients through the primary texting platform SMS and send mass text messages to your contacts and group—and do it all either through your phone or your computer.

MyRepChat was created by a financial advisor and a Registered Principal to provide a compliant solution to effectively and efficiently communicate with clients. We are committed to be the very best at enabling you to communicate with your clients at an affordable cost.

Connect with clients and track your communications through either your mobile phone, laptop, or desktop computer—your clients want to hear from you! Let MyRepChat be your full-time digital assistant, so you can spend more time with clients, growing your business.



Why texting?

- Consumers are **more likely to open text messages** before any other form of mobile communication.
- The average response time for a legitimate email is about 90 minutes, compared to **90 seconds for a text message**. (CTIA.org)
- SMS produces **engagement rates 6 to 8 times higher** than retailers normally achieve via email marketing. (Mobile Commerce Daily)
- 79% of mobile phone users check for new messages **within 15 minutes of waking up**. (IDC/Handyman Marketing)
- #1 reason affluent clients fire advisor: **lack of communication!**



Features + Benefits

Text and Group Messaging Birthdays, anniversaries, events, appointments, and more! With our platform, clients will never have to download an app or software to communicate with you. With group messaging, each contact receives an individual message.

Digital Assistant Scheduled, automated, and efficient client communication—leaving you more time to do what you do best.

Compliance Features A major challenge for firms looking to add text messaging to your approved technology package is monitoring and reviewing those messages. We communicate directly with your compliance department, ensuring your messages are properly monitored and retained, eliminating the need for your compliance department to log in to a new site or company to effectively do their job.

Import Your Contacts Easily import your contacts from your CRM or your mobile phone and begin texting immediately. Our CRM Integrations also allow you to have your conversations instantly archived in your CRM.

Keep Your Number You can keep your existing landline number and have text messages to that number flow through MyRepChat. Clients only need to know one number!

Auto-Forward If you don't have a landline number to text enable, we can create a text number for you and auto-forward all calls to a number of choice. The best part? You can change the number it forwards to at any time.

Scheduling Function You can plan and schedule messages in the future and create recurring messages to celebrate important dates. Push send once, and be worry-free while you're marketing is executed!

Integrated V-Card With MyRepChat, getting your contact information into the hands of your clients and prospects has never been easier. Your V-Card can be requested at will by clients and prospects or you can hit one button and send it. The best way to ensure your business card is never lost is to make sure it is saved as a contact immediately.

Customizable Workflows MyRepChat allows users to create customizable workflows. With these, a user can set their own rules to speed up the time it takes a client to receive a response. If a client texts a specific word or message, you can now train your system to automatically respond with your desired message.



ENTERPRISE BENEFITS

- Little or no set up charge
- Compliance integration
- Provides a competitive edge
- Cost can be absorbed by firm or passed directly to users
- Meets industry regulations
- You are always in charge with our Administrative Portal

USER BENEFITS

- Know your messages are received and read
- Increase personal touches with your clients
- You are easier to connect with
- Your staff can manage the entire process
- Automated responses
- Much more!



Who We Support

Discover how a partnership with MyRepChat can grow your business

Texting your clients is an important advantage for any financial advisor, and MyRepChat has many benefits, whether you are a Registered Investment Advisor, broker-dealer, or individual advisor.

We've currently established partnerships with organizations across the industry, including:



We've currently established direct archiving relationships with the following organizations and more:



We've currently established direct CRM relationships with the following organizations and more:



Wealthbox CRM

JUNXURE





Testimonials

"Providing clients with a variety of communication options isn't a luxury anymore. We feel it is critical to meet our clients where they are. That may be via email, web meeting, social media, phone calls, and increasingly, via text messages. Using the native cell phone messaging systems just doesn't get the job done. We needed a tool that my entire team could use, and would provide the archiving that compliance officers would expect. MyRepChat was the solution we had been trying to find. In addition to providing needed tools we sought, the support response has been amazing. If you need a compliance-friendly, client-centered text messaging solution, look no further than MyRepChat."

Derieck, Current User

"I'm very pleased with MyRepChat, it allows me to use text messaging with clients, and still be compliant in my record keeping, with no extra effort after set up. Clients, even over age 70, expect to be able to use texting as a form of communication. I'm thrilled to finally be able to use texting in my financial planning/investment advisory practice."

Randy, Current User



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