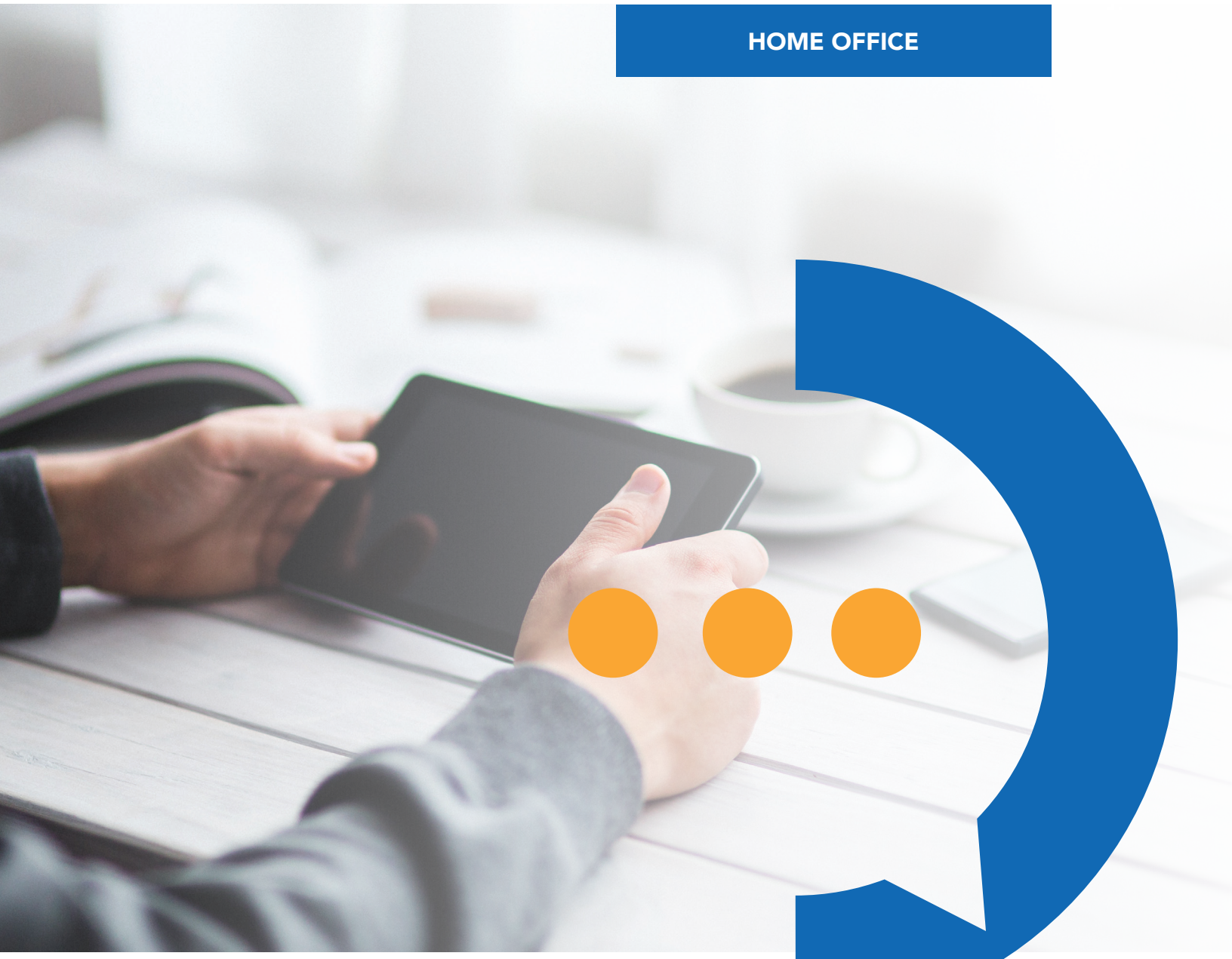




HOME OFFICE



*Compliant Text Messaging Solution*

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*"We have never worked with a vendor that is so easy to work with and helpful."*

**John, Compliance Officer with a Broker Dealer, and MyRepChat User**

*"The set up and implementation of MyRepChat was the easiest of any technology we've ever implemented."*

**Joe, CCO with a Broker Dealer, and MyRepChat User**



## MyRepChat was created by a Registered Principal

Working with compliance professionals is not the same thing as being a compliance professional. MyRepChat has many unique features tailored to the compliance professional. These features allow each organization the ability to customize not only the look and feel of MyRepChat, but also the policies and requirements they feel are most appropriate. Most organizations have their own interpretations of the regulatory guidelines; therefore, all organizations are provided the ability to customize based on those interpretations.



### YES, TEXTING IS FOR PROFESSIONALS

- **90%** of people say they'd rather receive a text than a phone call from a business. (Franchise Help, Text Request)
- Text messaging is the #1 preferred channel for customer service in the U.S. (Twilio)
- **85%** of consumers want to be able to engage in text conversations with a business - not just receive information. (Twilio)
- SMS/Text is the most requested channel for business use. (Smash, Wealth Management)
- **84%** of businesses use or plan to use texting in their sales and marketing efforts. (Salesforce)



# Why use MyRepChat as a Firm?



## IT'S TURNKEY

- MyRepChat is ready to implement in minutes
  - According to SavvyApps, it can take anywhere from 4-6 months to build an app and cost anywhere from \$500,000 to \$1,000,000 if built by a large agency
- **We archive where you archive.** There is no need to worry about building an integration or taking what your archiving firm is selling. We archive where you archive and if that changes, we've got you covered.
- MyRepChat can be adopted at an enterprise level or advisor level



## IT'S INTEGRATED

- We've built the **CRM integrations you and your advisors want and need to stay compliant** and consistent
- We have an **open API** so if you want another integration, we can accommodate
- iOS, Android, and Windows phones are all covered



## IT'S COMPLIANT

- Each user has an encrypted database and **all databases are SEC 17a-4 Compliant**
- **Messages are encrypted in transit and at rest**
- Personal and Business messages are always separate

# Telephone Consumer Protection Act

The TCPA (Telephone Consumer Protection Act) is a federal statute enacted in 1991 designed to safeguard consumer privacy. This legislation restricts telemarketing communications via voice calls, SMS texts, and fax.

*MyRepChat was created to facilitate communication between financial advisors and their existing and prospective clients. MyRepChat was not, and is not, intended to be a marketing or solicitation tool and our terms of use specify acceptable use of MyRepChat. If the terms of use are adhered to, violation of any TCPA Regulations will not occur.*

## How MyRepChat complies with TCPA

### NEGATIVE CONSENT (DEFAULT FEATURE):

The Negative Consent feature is non-editable and allows a client to opt-out of receiving text messages or phone calls from a MyRepChat user. This feature will prevent all outgoing activity to a client who has opted out. The database of clients who have opted out is stored at Twilio.

#### To Stop (Opt-Out)

- STOP
- Unsubscribe

#### To Start (Opt-in after opting out)

- START
- Unstop

### POSITIVE CONSENT (OPTIONAL FEATURE):

The Positive Consent feature allows an organization to create consent messages that is the first message to be sent to a client or prospect. This message can be customized based on the firms details or the MyRepChat users details in the event a DBA is being utilized. The key word to grant consent is "ACCEPT" and once received, communication can flow both ways freely.

#### Example of a Positive Consent Message:

*This is {contact} from XYZ Corporation, Inc. By replying with the word accept you are agreeing to the terms of use. Available at this link: [www.XYZCORPterms-of-use](http://www.XYZCORPterms-of-use). Reply with the word 'ACCEPT' to continue.*

Upon Accepting (Opt-In), the client is also sent a notification letting them know that they are able to revoke their consent by using one of the Opt-Out key words listed above.

#### Message sent to client after Accepting (Opt-In):

*Text STOP to stop receiving messages from this number.*

### MESSAGE DISCLOSURE (OPTIONAL FEATURE):

The Disclosure Feature allows 160 characters to be added to an outbound message for the purposes of providing a disclosure. Our new Rules Based Disclosure feature allows an organization to create specific policies that determine which disclosure message to utilize and how often to be sent.

#### Example of Disclosure:

*XYZ Terms of Use: [www.XYZCORPterms-of-use](http://www.XYZCORPterms-of-use)*



## Data Loss Prevention (DLP)

Prevent users from transmitting sensitive or critical information.

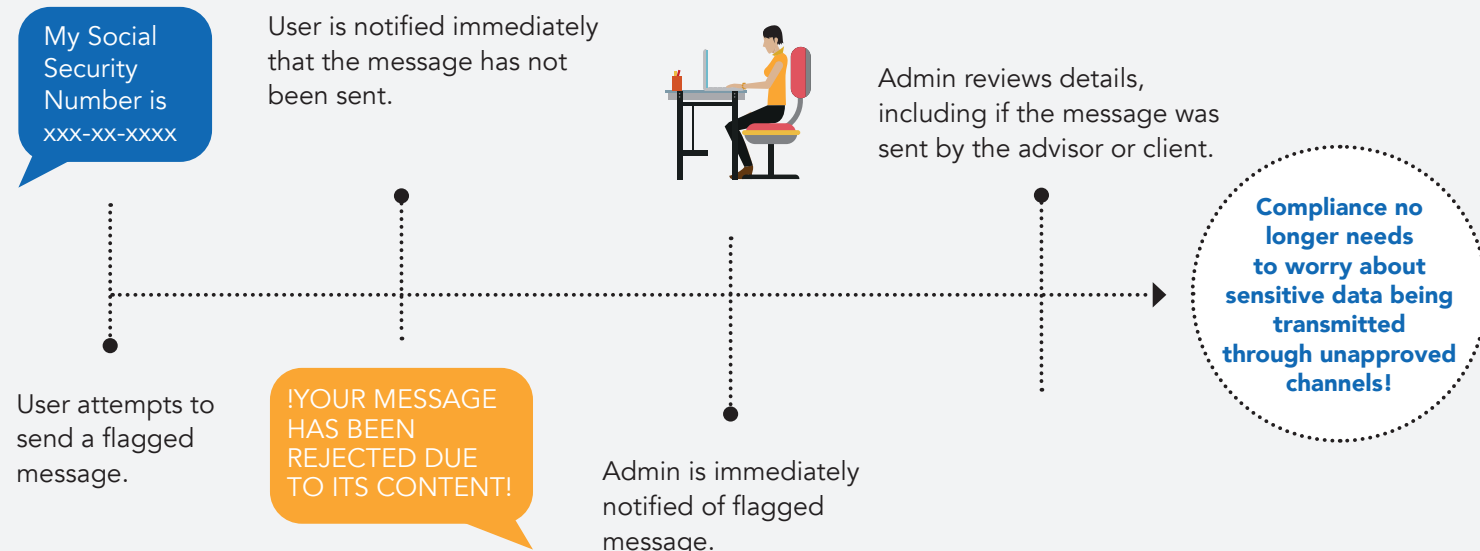


### MYREPCAT'S DLP FEATURE ALLOWS FOR:

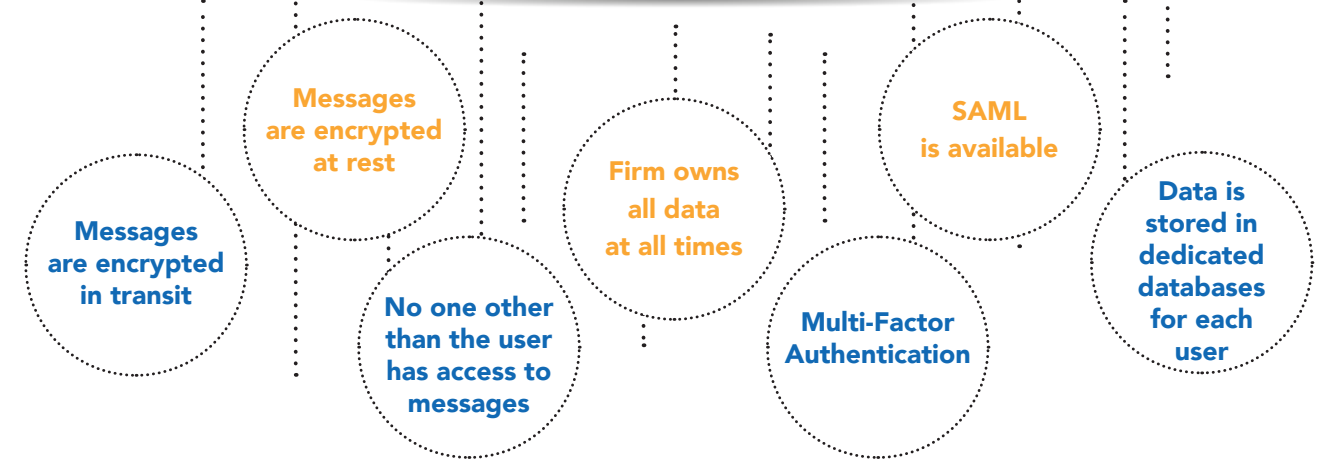
- 100% customization
- Immediate triggers and notifications
- **Pre-Review:** requiring an approval or rejection of message
- **Post-Review:** Allows message to be sent; however, still triggers a notification
- **Reject:** Allows for messages containing sensitive data to be automatically rejected

**Pre-Review of a text message has been almost impossible up until this point. With our new DLP feature, it is now possible!**

### DATA LOSS PREVENTION EXAMPLE:

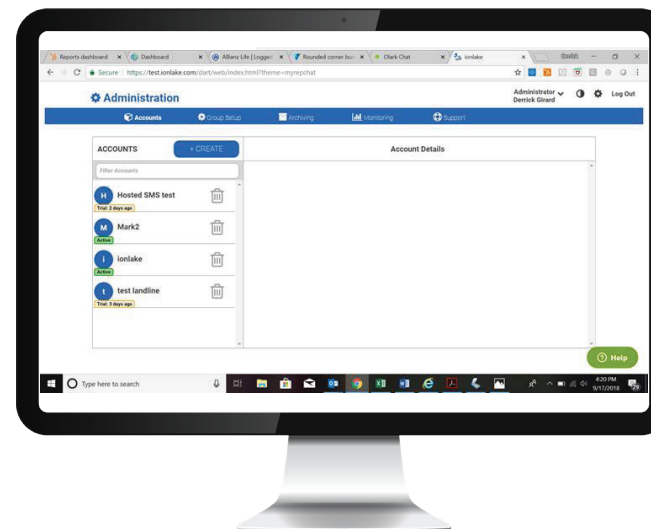


## Security



## Control at Your Fingertips

With MyRepChat's Administrative Portal, your home office can have control over virtually every aspect of MyRepChat.



- Set consent rules
- Set Data Loss Prevention phrases and patterns
- Manage users
- View activity and usage statistics
- Turn features on/off
- So much more!



## Capture + Access Text Messages in your Existing Archive:

If your archiver already handles your email, social media, and website monitoring, why find a new archiver? MyRepChat creates a simple, yet flexible way to facilitate the capture, review, and archive of all business related text messages. Text messages containing words, images, emojis and even documents are all captured, time and date stamped and sent directly to your archiver based on the frequency you request. Best of all, if you change your archiving relationship, we can change with you.

Please check [myrepchat.com](http://myrepchat.com) for the most up-to-date integration partners. Our integration partners grow continuously.

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

## How do we compare? Choose the right partner.

Don't be fooled by the big names and the well-crafted sales pitches. Start by asking the right questions and getting the answers you need to feel comfortable.

Not having a solution is no longer an option. We've created a simple checklist to help you ensure that you're making the right decision for your firm and your advisors.

HOME OFFICE QUESTIONNAIRE ✓ = YES			
	MyRepChat		
Do we get a dedicated administrative portal?	✓		
What is the cost to have this?	FREE		
Can we establish our own disclosure requirements?	✓		
Negative Consent	✓		
Positive Consent	✓		
Disclosure Messages/Links	✓		
Can we be alerted if a user alters their profile?	✓		
What is the set up cost?	\$0		
Can we add our own logo and color scheme?	✓		
Can we view and oversee all users?	✓		
Can we see their usage?	✓		
Can we see their texting number?	✓		
Can we de-activate or terminate their account?	✓		
Do we get a dedicated URL for users to sign up under our firm?	✓		
Can users sign up without needing to contact the vendor?	✓		
Can users assign their texting number instantly or is there a delay?	INSTANT		
Can users use their office phone numbers for business texting?	✓		
Can a user sign up and begin texting immediately?	✓		
Am I notified when a user signs up?	✓		
Is it integrated with our existing archiver?	✓		
Where is the company located?	MN		
Who owns the data?	FIRM		
What is the minimum number of users we must have?	0		



## MyRepChat offers an organization two ways to adopt MyRepChat:

	OPTION 1: ENTERPRISE	OPTION 2: SUBSCRIPTION
No set up costs	✓	✓
No commitment of MyRepChat users		✓
MyRepChat license purchased for all advisors	✓	
MyRepChat can bill the user or the home office		✓
Lowest pricing option	✓	
MyRepChat is billed to the home office	✓	
Margin can be added by organization	✓	
Full Administrative Portal	✓	
Admin Training	✓	✓
Advisor Onboarding (live webinars and conference attendance)	✓	✓
Full functionality of MyRepChat for all users based on policies established in the Administrative Portal	✓	✓
Dedicated sign up	✓	✓

The subscription options allows an organization to adopt MyRepChat with no expense and no commitment of users.

## Administrative Portal:

Every organization gets their own Administrative Portal to allow them to create a customized version of MyRepChat. The Administrative Portal allows for end to end customization, unique policy creation and account administration.

### WITH AN ADMINISTRATIVE PORTAL, AN ORGANIZATION CAN:

- Set TCPA policies
- Establish DLP patterns
- Establish archiving integration for the entire organization
- Customize their archive report layout and frequency
- Validate their archive data has been sent and received by archiver
- Turn features on or off based on their requirements
- Establish account creation guidelines
- Add Admins
- Find their unique URL or App Code to allow users to create account
- Create accounts for users
- Activate, Suspend or Terminate accounts
- Check account or organization wide activity
- Determine which integrations are used the most by advisors
- Reset user passwords
- Much More!

### YOUR QUESTIONS...ANSWERED

Can we use SAML for logging in?	YES
Does MyRepChat integrate with CRMs?	YES
Can we turn features on or off based on our guidelines?	YES
Is there a setup fee to get started with MyRepChat?	NO
Can MyRepChat handle and deliver to my archive Emojis, Videos, GIFs, Documents?	YES





(844) 402-CHAT

info@ionlake.com

[www.MyRepChat.com](http://www.MyRepChat.com)