

# Are you ready to text compliantly and make high quality cellular calls?

## INTRODUCING HEARSAY RELATE

When you decide to activate Hearsay Relate, you will be able to text and call clients from anywhere, while remaining compliant, allowing you to accelerate productivity across the field while adhering to regulatory requirements. You don't need an extra phone to get going!

## ACCELERATE ADVISOR PRODUCTIVITY

With an intuitive mobile app that's easy to download and install, you can quickly get setup to text message with compliance oversight, and do it all while you are on the go. Using Hearsay Relate, you can easily schedule appointments, send meeting reminders to clients, and follow up with a phone call that is crystal clear – all within the same app.

## COMMUNICATE WITHOUT BREAKING COMPLIANCE

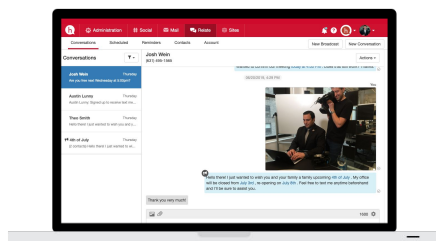
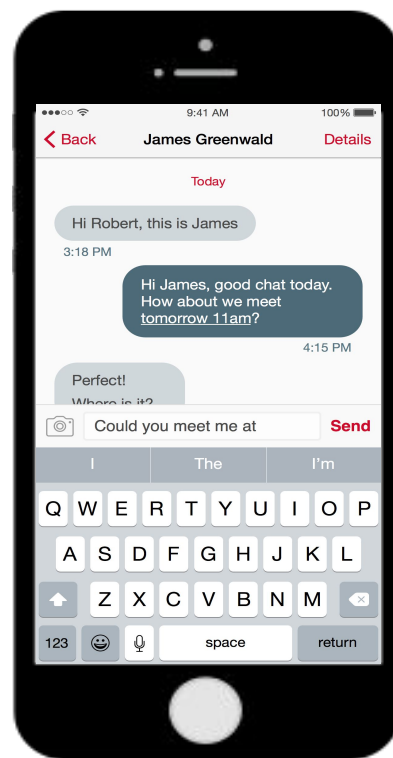
Hearsay Relate enables you and your Legal and Compliance teams to meet the requirements from FINRA, SEC, IIRCO, FCA, MiFID II and other industry regulators. All messages sent and received within Hearsay Relate are seamlessly captured. The Universal Dashboard provides an efficient workflow to review lexicon and activity-based alerts, mitigating your risk and allowing you to compliantly communicate with your clients.

## HOW TO INTERACT WITH YOUR CLIENTS

Stay ahead of the curve by scheduling important text messages in bulk.

Examples include:

- Calendar Integration – Text to calendar instantly
- Quick Replies – Respond fast and efficiently
- Reminders – Leverage our industry-specific workflows
- Birthdays & Anniversaries
- Life moments
- Annual/Periodic Reviews



[hearsaysystems.com](https://hearsaysystems.com)

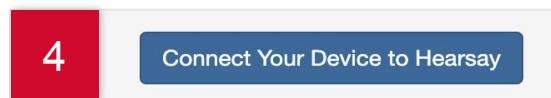
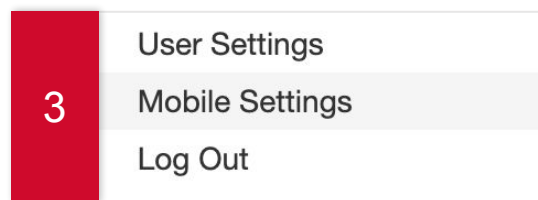
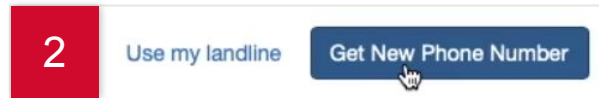
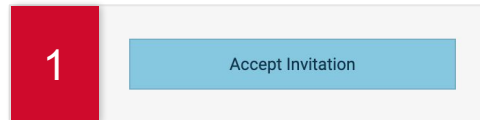
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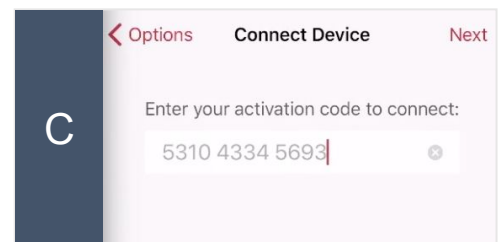
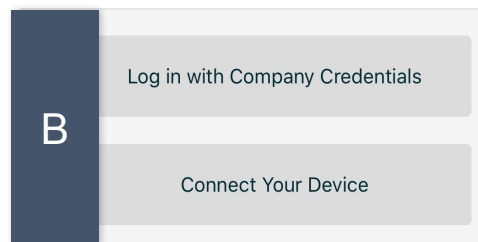
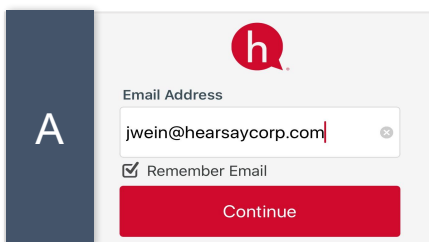
# Getting Started with Hearsay Relate

## START HERE - WEB APPLICATION

1. Open the email invitation from Hearsay and click the link within to log into your Hearsay Workspace.
2. You will be prompted to create your Relate account via an onboarding wizard. Choose to either connect a text-enabled landline number, or receive a free dedicated texting and calling number from Hearsay.
3. Once you have completed the onboarding wizard, click your User Panel in the top-right corner of your workspace and choose Mobile Settings to connect your workspace with your mobile device.
4. Click Connect New Device.
5. Follow the 3 steps below (A,B,C) on your mobile device.



## MOBILE DEVICE SETUP



Texting Is The Most Efficient And Responsive Communication Channel

98% of text messages are opened  
90% are read within the first 3 minutes

## SUPPORT TEXT

Text 611 if you need help with anything from how to get your new Hearsay Relate number or to enable your existing landline number for texting. We can even help you upload or transfer contacts to start sending your first texts from Relate.



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