# MultiLine for Financial Services

Enable seamless and compliant communication with your clients.

Banks, wealth management advisors, investment firms, and insurance companies have three main requirements: to communicate seamlessly with clients, extract intelligence and best practices, and stay compliant. With these three cornerstones in place, mobile-first becomes a reality.

MultiLine provides secure and compliant calling and texting through a separate mobile phone number and app on your employee's corporate or personal device. All communication data is captured and sent to your archive or CRM so you can engage with clients with greater efficiency and immediacy while minimizing your firm's compliance, legal, and reputational risk.

Centralize client communications through a single app on your mobile device
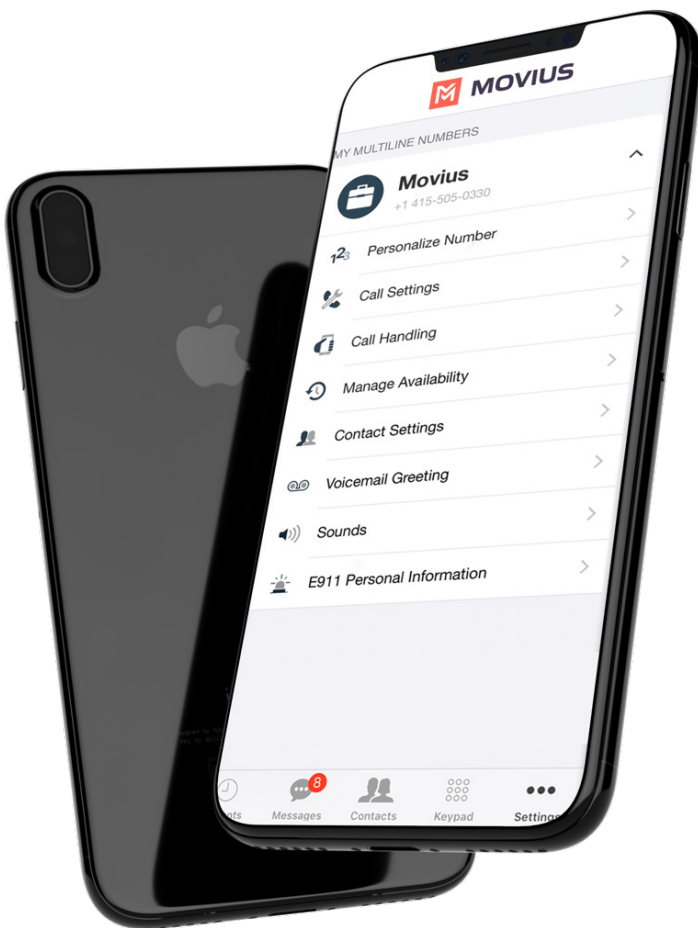
BENEFITS:

Compliance
Capture all your client communications and send data to your compliance archive to adhere to MiFID II, FINRA, Dodd-Frank and GDPR requirements.

Productivity
Capture all client engagements in a single system of record to extract business intelligence, surface actionable insights, and draw best practices.

Client Engagement
Communicate efficiently with your clients on the channels they prefer to deliver exceptional service and experience.

Product Features

Secure Business Number
Separate app, dialer, contact list, caller ID, voice mail, SMS and call logs, do not disturb and scheduler.

Compliant Texting
Securely communicate with clients more efficiently with SMS with ability to create automatic workflows to capture client consent and redact certain keywords or phrases.

TCPA Opt-In, Opt-Out
Set up rules that trigger request for positive client consent for communication approval prior to engaging over text messaging.

Lexicon Alerts
Define list of lexicon terms and set workflows to redact or block outgoing messages based on rules with real-time alerts and reports for risk governance and supervision.

Voice and Text Capture
Options to record just voice, just SMS, or both no matter on Wi-Fi, data or cellular. Enjoy multiple recording, storage and retrieval options (such as support for live voice call recording).

Supervision Workflows
Audit trails, lexicon alerts and reports help compliance and mobility teams meet obligations and maintain visibility across all business voice and text.

Auto-data capture in CRM
Capture voice and text with zero disruption to the workflows of end users and send data seamlessly to your archive or CRM of choice.

Manage within MDM
Easily deploy, secure, and manage the MultiLine app with leading providers like Microsoft Intune, BlackBerry Dynamics, Workspace One, and Mobile Iron.

Why Multiline?

Proven
Trusted by top global banks as a standard for mobile communications

Compliant
Tailored to the exact compliance and security needs of financial services firms.

Integrated
Tightly integrated with the mobility management and archiving technologies most prevalent in the banking industry

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