



#hearsay social™

THE LEADING SOCIAL SELLING SOLUTION, BUILT FOR
ASSET MANAGEMENT

Hearsay Social is the leading social selling tool for wholesalers. That's why more than 150,000 reps at the world's most successful firms rely on it to attract prospects, retain clients, and grow their book of business.

How? Hearsay Social makes it easy to nurture advisors and referral centers with personalized content, then connect one-on-one at moments that matter. The simple, mobile-first approach turns social media into a sales tool for even the most seasoned wholesalers.

Built for the enterprise, Hearsay Social includes robust compliance and supervision functionality, seamless integration with critical applications like CRM, and tools to demonstrate the ROI of your program — all backed by partnership with our industry-leading Client Services team.

BENEFITS

- Increase advisor acquisition & advisor retention
- Expand corporate marketing reach & brand governance
- Improve wholesaler retention with tools to succeed in today's digital environment
- Efficiently mitigate risk with ai-powered compliance & supervision
- Quick implementation, deployment & onboarding for rapid time to value
- Save time curating content — Hearsay Social includes personalized, asset management-specific content
- Easy integration with your core enterprise systems, like CRM, archive, websites and more
- More than posting content — a sales automation tool for wholesalers

OTHER PRODUCTS



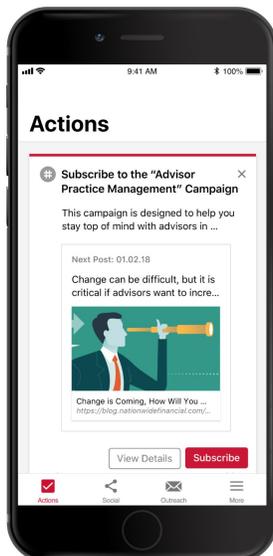
Relate



Sites



Actions



WHOLESALE SIMPLICITY

- Automatically post to social networks and your website with Campaigns
- Engage advisors & prospects on Facebook, LinkedIn, Instagram, Twitter, your website, and email from one simple app
- Content recommendations are personalized to you and your portfolio, and most importantly the advisors & referral centers you want to attract
- Take the guesswork out of social with the Action List; it's a social selling to-do list built to help every wholesaler succeed

PLATFORM TO EXPAND

- Quickly add digital sales channels - critical to wholesalers' success - in one easy-to-use app
- Seamlessly integrate with other systems to unify data and drive efficiency across your business
- Increase conversion and loyalty by prompting wholesalers to follow-up with advisors and referral centers at moments that matter

PARTNER FOR SUCCESS

- Full-service Client Services organization to accelerate your time to value
- Maximize social selling ROI with asset management industry best practices
- Drive unprecedented adoption with on-demand consultations for every wholesaler at your firm

ENTERPRISE COMPLIANCE READY

- Built-in compliance for FINRA, SEC, IROC, FCA, MiFID II, and CASL-regulated firms
- Streamline compliance processes with pre-approval workflows, real-time alerts, supervision and approval trails, and infraction resolution – all from the Universal Supervision Dashboard
- Efficiently capture, monitor and archive digital wholesaler-advisor communications through the corporate network, mobile devices, and remote locations

INTEGRATIONS



Learn how Hearsay Social can help your advisors grow their business:

VISIT	hearsaysystems.com
EMAIL	contact@hearsaysystems.com
CALL	+1 415-692-6230 +1 888-990-3777

“More and more financial advisors are using social media to engage current clients, connect with prospects, and grow their practices. We want to be right there—where those conversations are happening—with information, ideas, and multiple product solutions that help advisors address their clients’ needs.”



CHRISTINE TUCKER
VP, MARKETING
PACIFIC LIFE

ABOUT HEARSAY SYSTEMS

Hearsay Systems is reinventing the client experience in Wealth Management, Insurance and P&C with compliant digital communications and workflow solutions. Over 150,000 advisors and agents at the world's largest financial services and insurance firms leverage Hearsay to engage with customers and build stronger relationships to grow their business.

With Hearsay Cloud for financial services, advisors and agents provide real-time, personalized and seamless client experiences across the right channel - social, texting and mobile - at the right moment. Automated, pre-built industry workflows for insurance and wealth management provide one-click actionable suggestions for targeted engagement. Built for the enterprise, Hearsay Systems connects data and every client interaction to corporate CRM systems and digital marketing programs – all on a secure, compliant enterprise-ready platform.

Hearsay is headquartered in Silicon Valley with locations throughout North America, Europe and Asia. Connect on [Facebook](#), [Twitter](#), [LinkedIn](#) and the [Hearsay blog](#).

