



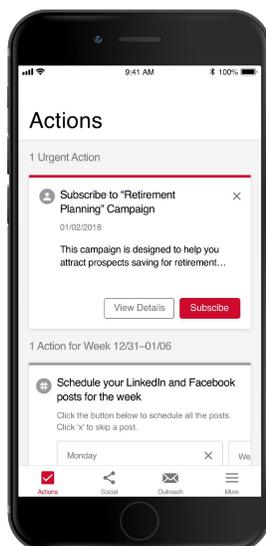
# #hearsay social™

THE LEADING SOCIAL SELLING SOLUTION, BUILT FOR WEALTH MANAGEMENT

Hearsay Social is the leading social selling tool for financial advisors. That's why more than 150,000 advisors 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 clients and prospects 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 advisors.

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 net new AUM & client retention
- Expand corporate marketing reach & brand governance
- Improve advisor 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, wealth 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 advisors

## OTHER PRODUCTS



Relate



Sites



Actions

## ADVISOR SIMPLICITY

- Automatically post to social networks and your website with Campaigns
- Engage clients & prospects on Facebook, LinkedIn, Instagram, Twitter, your website, and email from one simple app
- Content recommendations are personalized to you, your practice and most importantly the clients 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 advisor succeed

## 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 advisor-client communications through the corporate network, mobile devices, and remote locations

## PARTNER FOR SUCCESS

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

## PLATFORM TO EXPAND

- Quickly add digital sales channels - critical to advisors' 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 advisors to follow-up with clients at moments that matter

## INTEGRATIONS



We're a heavily regulated firm. Hearsay has empowered our teams to leverage their social networks and align our people with our brand. It's enabled a small sales staff to find new opportunities while also building and deepening relationships. By using Hearsay, our sales team can optimize their profiles and publish approved content relevant to their audience. Doing so helps them create a professional, personal brand."



**JULIE HESSON**  
SOCIAL MEDIA MARKETING MANAGER  
T. ROWE PRICE

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

## 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](#).

