

Symphony Messaging

Federation

Communication without compliance headaches

Mobile messaging and calling is here to stay. Federation enables fast, compliant communication with billions of users across consumer channels. Purpose-built for financial services, its enterprise-grade capabilities and recordkeeping deliver seamless client engagement, regulatory compliance and mobile innovation.



Empower your organization to communicate compliantly with a global audience by leveraging key external networks such as WhatsApp, WeChat, SMS, LINE, and voice.



Client engagement

Stay competitive and engage clients on their preferred channel. Seamlessly switch between messaging and voice for a best-in-class service.



Regulatory compliance

Proactively monitor, survey and archive communications to simplify compliance burdens and give regulators and clients confidence in your regulatory posture.



Mobile innovation

Arm your firm with robust yet intuitive communication features familiar from everyday life – helping drive adoption across the firm and empowering a strategy of innovation.

We want to operate in a way that suits clients but we must also remain compliant. Symphony offers a single out of the box solution making organizational adoption seamless.

Mohamed Khalifa, Executive Director, Head of AI & Innovation, JP Morgan Private Bank

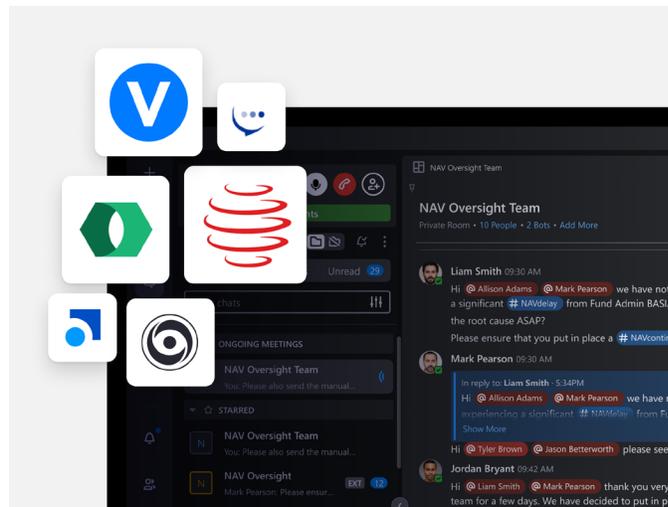
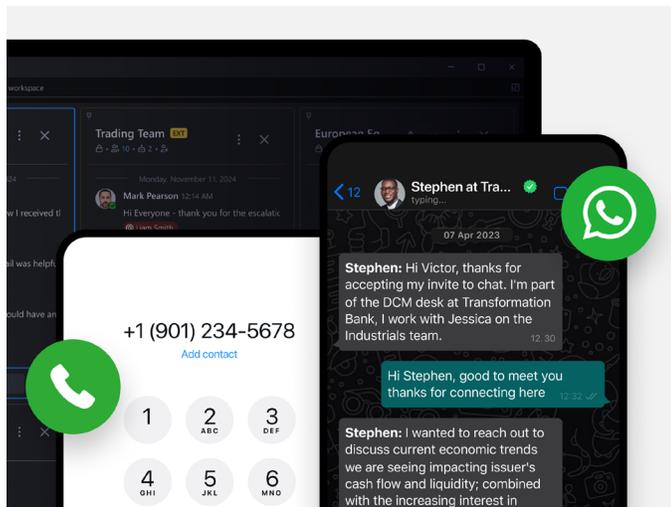
How it works

For users

Add or import basic contact information to start conversations between Symphony's Messaging platform and external channels; or share your **Virtual Number** for inbound connections.

For compliance

Monitor, retain and export content to the archival provider of your choice, enabling holistic communication compliance with any and all of your other channels.



Why Federation?

Global companies are achieving significant improvements in communication governance and compliance with Symphony's Federation.

Increasing our Symphony licenses enterprise wide enables us to remain compliant and improves the customer experience we deliver. We had up to five different chat tools and the majority did not include mobile, putting us at a disadvantage. Non encrypted SMS carries serious risks, we've found a fully functional solution to meet our customers on their chosen communication channels.

Mauricio Sada-Paz, Managing Director, Global Head of eFICC Sales, Bank of America

Watch 'Simplifying Off-Channel Communication' at Innovate 2024 — [Learn More](#)

Key features and benefits

Enhance communication governance and compliance

Enhanced control and security

Manage users, set active compliance filters, and prevent data leakage with the Admin and Compliance Portal.

Ensure secure communication across networks with Symphony, a trusted public network connector.

Dedicated support

Receive white-glove service for both customer success and technical account management, tailored to your needs.

Streamlined collaboration NEW

Quickly connect with contacts, scale contact creation with CRM imports, and utilize our broadcasting functions for efficient communication.

Embed Federation in Microsoft Teams to enable compliant external communication without leaving your preferred platform. [Learn more](#)

Increased efficiency and automation

Simplify tasks with Symphony's developer platform, enabling system integration and automation for everyday interactions.

Record and analyze voice calls with playback, transcription, and flagging capabilities.

Improved client experience

Tailor the messaging experience with custom templates, interactive forms, and your corporate branding.

Mobile-first compliance NEW

Enable compliance on mobile devices with **Virtual Number**, separating business and personal communications. [Learn more](#)

Learn more at symphony.com or contact sales@symphony.com

Disclaimer

© 2026 Symphony Communication Services, LLC - Public document

Neither Symphony Communication Services, LLC (together with its affiliates, "Symphony") nor the services which Symphony offers to its customers ("Symphony Services") is subject to the oversight or jurisdiction of any financial regulatory body.

Symphony is not, and shall not be construed as, a registered broker-dealer, an underwriter of securities, an introducing broker, or an entity performing similar or other regulated functions. Similarly, Symphony is not registered as, or to be construed as, a multilateral facility (including but not limited to a SEF, MTF or OTF), trading venue, regulated market or exchange. Because Symphony does not act in these capacities, nor is Symphony registered to do so, any indication to the contrary in this document or in any other document provided to you by Symphony shall be interpreted to the maximum extent so as not to imply that Symphony is acting in such capacity (or in any other capacity that is subject to regulatory oversight or subject to a requirement to register with a financial regulator).

Any Symphony Service that permits customers to negotiate the terms of any financial instrument is offered, and only capable of being used, on a purely bilateral basis. Symphony has no role or involvement in the negotiation or arranging of any transactions in financial instruments nor in the introduction of counterparties to one another for purposes of entering into such transactions. The execution of any such transaction is solely as between the counterparties thereto, and Symphony does not perform any execution, clearing or settlement function for any financial instrument transaction. To the extent that any Symphony customer utilizes Symphony Services for purposes of negotiating financial instruments, it is solely the responsibility of such customer to comply with any regulatory requirements to which such customer, or such negotiation, may be subject.

Neither this document, nor the offering by Symphony, or use by any Symphony customer, of any Symphony Service, shall be construed as a solicitation, endorsement, offer or recommendation by Symphony to buy, sell or hold any financial instrument, or an offer to provide any investment advice or investment services to any person in any jurisdiction. Recipients of this document and users of all Symphony Services alone assume the responsibility of evaluating the merits and the risks associated with the use of the Symphony Services.

Symphony is not a provider of call bridging services or any other regulated telecommunications functionality, and Symphony serves solely as a sales agent or network manager, and not as a "reseller," in facilitating use of any regulated functions. Symphony is not responsible for originating PSTN voice calls from, and terminating calls to, users on its platform, and such functionality is provided by third-party service providers.

Furthermore, certain of the statements and terms contained in this document may be forward-looking and contain concepts, product ideas or functionalities that are not currently part of the Symphony Service suite, but are instead contemplated by Symphony to be offered to customers at a future date. There is no guarantee that any such functionality will be offered by Symphony, and until such time, if any, as a particular functionality is included in the Symphony Services pursuant to a contractual agreement between Symphony and the customer utilizing such functionality, the depiction of such concepts, ideas and functionalities shall be construed as forward-looking only.

Nothing in this document or in the license or operation of any Symphony Service constitutes a representation by Symphony that is contrary to the foregoing disclaimers.