

Chat to Clients on WhatsApp

Securely, with Symphony

WhatsApp—the number one messaging app in the world and growing fast. Your clients use it extensively in their personal lives and naturally want to use it in their financial lives too.

However WhatsApp and other encrypted personal messaging apps are unauthorized for communication with clients, as interactions can't be monitored by compliance.

Yet High Net Worth clients are far more likely to engage on the social messaging apps they use every day rather than an additional bank mobile app.

You Now Have a Solution

Symphony has created a safe way for advisors, private bankers and other relationship managers to communicate with clients on WhatsApp while keeping that communication secure and available for compliance to monitor.

Build Client Relationships

Enable deeper client engagement and differentiate your Wealth Management service

- **A Personal Client Experience:** Engaging with clients on their personal app of choice builds a more human, in-person experience creating trust and leading to lasting relationships
- **More Responsive Service:** Relationship managers can provide instant answers and real-time service rather than missing phone calls or emails while in meetings or on the move
- **Still Secure:** Messages sent between Symphony and WhatsApp are end-to-end-encrypted so clients can be certain that sharing their sensitive information this way is safe



Symphony CONNECT for WhatsApp:

- An API integration between between WhatsApp and Symphony enabling Compliance export of all messaging content
- A completely native experience - clients use WhatsApp the way they do for other chats, while your Wealth Management teams stay on Symphony
- Create one to one or group chats with multiple advisors for clients supported by a team or to provide back-up support

[Learn More](#)

Contact your Symphony account manager or reach out to us at CONNECT@symphony.com