

# CASE STUDY



## Top 5 Reasons Why Regency Wealth Management, LLC Chose ClearlyIP

1. Clearly Anywhere, mobile softphone app for remote workability.
2. Sendfax.to for seamless virtual faxing from any device.
3. Exceptional Customer Service – Second to None.
4. Easy-to-Use Feature Rich Desktop IP Phones.
5. Highest level of security and redundancy to meet strict requirements of the financial industry.

## Regency Wealth Management, LLC relies on ClearlyIP for a Total Voice Communication Platform



<http://myregencywealth.com/>

### OUR CUSTOMER

Regency Wealth Management, LLC is a multigenerational, locally-owned and operated financial services firm, headquartered in Appleton, Wisconsin. Regency Wealth Management, LLC believes in having an overall financial plan with frequent reviews is important for your personal financial well being. As lives change, often so do financial needs. Regency Wealth Management and their team of financial service professionals available through LPL Financial are experienced, committed to a high level of client service, and focused on helping each client work towards their individual goals.

### BUSINESS CHALLENGES

As a financial firm, transparency and communication is a key requirement to long term relationships. Regency Wealth Management, LLC required a voice solution with a priority focus on security as the financial industry has critical requirements on secure & reliable technology for its communication platforms- especially in connection with VoIP and Telephony. Regency Wealth was using a combination of two or three digital and analog telephone systems at their location. All of the legacy phone equipment was expensive and didn't provide them the tools they needed for their growing firm.

Regency was looking for a long-term solution that offered seamless collaboration with its customers and internal staff.



Faxing was a growing requirement for the firm as in the financial sector faxing is still a widely used form of communication especially for sensitive financial documents containing Personally Identifiable Information (PII) to include financial applications and service paperwork which needs to be treated with the highest level of protection. They wanted a fax solution that would work on any device no matter where you were, at a client site or in the office with complete peace of mind the transmissions were secure and protected.

They also wanted to improve their remote workability as more and more they were accommodating their Customer's schedules when communicating with them. With a focus on being able to answer calls no matter where they are; in the office, travelling or at home.

## THE SOLUTION BY CLEARLYIP

ClearlyIP designed a complete voice platform package to implement for Regency. From robust appliances to physical desk phones. Mobile enhanced softphones to a virtual fax platform. All backed with white glove service/support for ease of implementation and training.

With a focus on security, the team implemented a robust, secure on premise phone system that included all the features and functionality tightly integrated with the various devices. New CIP IP Desk phones with Color LCD Displays and Dual Gigabit Power Over Ethernet were fast and easy to install.

A completely new virtual fax platform- Sendfax.to that would allow them to send and receive faxes from any phone number,

from their email, on a computer, tablet, or mobile device. Safely and securely. And easily manage their fax transmission confirmation.

New Mobile Softphones were recommended for ease of connectivity and for the growing demand to always answer . calls from clients needing help with their portfolio or family matters.

A complete turn key solution to enable the Regency personnel to collaborate easily and productively with very little learning curve.

## THE RESULTS

The Regency team quickly adopted the new technology and immediately utilized the new phone system for all of its client and internal communications. They were especially impressed with the Sendfax.to Platform and how more productive and cost effective it was for them to send and receive important financial fax communications. From any device!

The financial advisors immediately appreciated the confidence to never miss a call with Clearly Anywhere, the mobile Softphone. So no matter where they were at any given time, they could receive calls from their clients on their business number- as if they were sitting at their desks.

Always staying connected. Securely. Reliably. Meeting the demands of the financial sector.



In an industry that is built on relationships, transparency, and trust- the solutions by ClearlyIP enable us to communicate securely and effectively with our clients. Our customers know they can always reach us with our seamless communication tools- no matter where we are, we are always connected. I wouldn't hesitate to recommend ClearlyIP for all your business voice solutions.

~ John Kosmer, Managing Partner, Regency Wealth Management, LLC

