



Oregon Pacific
Financial Advisors, Inc.

Talk It Mobile is an Office Workflow Solution

Introduction

A thriving financial advisory practice must run efficiently to properly serve its clients. Oregon Pacific Financial Advisors has found that Mobile Assistant provides more than just transcribed notes regarding client interactions. Partnering with Mobile Assistant has also led to meetings with the Client Success Team to improve the workflow for the firm, ensure concise and accurate documentation, and decrease missed opportunities.

TIME SAVED &
OPPORTUNITIES
INCREASED

STREAMLINED
WORKFLOW

GET THE TYPING
OF NOTES INTO
PROFESSIONAL
HANDS

The Story of Oregon Pacific Financial Advisors

Royal Standley joined Oregon Pacific Financial Advisors in 2006. His focus is to assist clients in making the best choices for their future. He enjoys discovering more about his clients and using problem-solving skills to help both retirees as well as people just starting in the workforce.

James Monroe and Emma Nelson both joined Oregon Pacific Financial Advisors in 2019. James focuses on relationships, financial education, and broadening networks to assist his clients. Emma steers her interest toward the younger generation, educating them on sound financial decisions they can make now to plan for their best future.

Before entering a professional relationship with Mobile Assistant, Oregon Pacific Financial Advisors relied upon notes that were either handwritten or typed into the CRM by the advisor. This posed many problems for the team as a whole, such as inability to read handwritten notes, late or missing documentation of client interactions, and missed opportunities.

Mobile Assistant's Talk It Mobile app provided an efficient and accurate method of capturing documentation of client interactions in a timely fashion with the added bonuses of giving the advisors more time in front of clients and streamlining the firm's workflow.



Emma Nelson
Associate Financial Planner

TIME SAVED & OPPORTUNITIES INCREASED

The deciding factor in selecting Talk It Mobile was time saved. "My handwritten notes are useless to anyone else. After a short time, they're useless even to me. I just explain the story. It's more natural." Emma also found that it takes her about 90 seconds to dictate all the information she needs to summarize a client meeting, which has definitely saved her time.

Everyone in the office can access the client record through Redtail. In one instance, when Emma dictated tasks to be completed by administrative staff, that person noticed the client had another child. The ease of access to that information prompted the admin to ask whether Emma will be setting up another 529 for this client.



James Monroe
Financial Planner & Retirement
Plan Specialist

STREAMLINED WORKFLOW

"Talk It Mobile is a simple way to get your notes into the CRM, which we all try to keep track of. I don't have to go type notes and add to the CRM. My assistant doesn't have to decipher my notes either. The templates keep us on track and help keep track of data."

James' focused specialty is financial literacy and with Mobile Assistant helping him serve his clients by having all the important details organized for him, things do not fall through the cracks and he can keep his clients on the forward momentum.



*Royal Standley, ChFC, AIF,
CLTC, CRPS
President & CEO*

GET THE TYPING OF NOTES INTO PROFESSIONAL HANDS

Royal is the President of Oregon Pacific Financial Advisors and has found Mobile Assistant to be a remarkable tool for his firm. Royal has been in the financial industry for over 20 years and says that "Mobile Assistant has been such a game-changer. I have so much more detailed and consistent notes. I don't have as much delay in actually getting my notes done [...] it's just so much easier to grab my phone and hit a button." He also related that he's a "terrible typer" and it's been a massive benefit to have the pros do the typing for him.

Royal also points out that because of Mobile Assistant's email distribution system, he can have his "entire team see what's happening; there are double checks in case I miss something and it always gets caught. Nothing is falling through the cracks like it could have in the past before Mobile Assistant."

Overall Results

The combined effects of professional human transcriptionists, a streamlined workflow, and the amount of increased opportunity and hours of saved time each week has led Oregon Pacific Financial Advisors to be an even more successful team than before. Between Royal, Emma, and James, these three advisors have a lot to say about how Mobile Assistant has helped them grow and establish better routines to achieve a more efficient daily workflow.

“What the heck? Why aren’t you using this?” – Royal Standley, ChFC, AIF, CLTC, CRPS, President & CEO

Your firm can be efficient too!

Just as Oregon Pacific Financial Advisors discovered that Mobile Assistant does more than just transcribe dictated notes, your firm can partner with us to realize increased time to spend either in front of your clients or at home with your family. Additionally, your documentation will be organized and efficient. Visit www.mobileassistant.us or schedule a Success Session below to learn more!



MobileAssistant™
Talk, Don't Type

[Schedule Success Session](#)