



Why Mobile Assistant? “Advisor and OSJ Perspectives Case Study”

Our customers love us because we improve their client experience process and increase efficiencies, while making more money at the same time! Read further to see what some of our top clients have to say about Mobile Assistant.

Nichole Reinhardt – CW Financial Strategies/Cambridge Investment Research Advisors



Nichole Reinhardt is an OSJ and compliance officer with CW Financial Strategies. Considering the scope of Nichole’s duties involved in her role, Mobile Assistant has played a big part in helping her gain efficiency across the board.

Nichole has this to say about the Talk It app by Mobile Assistant:

- *“Because of my job, my usage of Mobile Assistant is a lot and then nothing, and then a lot and then nothing. I’m using Mobile Assistant to document that I have met with a rep, what we discussed, what we did, and that kind of thing. I highly recommend to any rep that I consult with about using a CRM that Mobile Assistant integrates with. After all, why would you have one and not the other?”*
 - *“If and when a rep tells me they aren’t sure how to dictate notes and they wouldn’t know what to say, I tell them about the Assistant Templates, that they have a script they can customize, and that it’s a great way to get started.”*
 - *“If you want to run an efficient office, you need to incorporate Mobile Assistant. I don’t believe I’ve ever had to edit a dictation from Mobile Assistant. You can tell there’s a human being doing the work on the other side. “Consistency - because things actually get documented when they’re relatively fresh. There could be nuanced details that might be very important later on and those get captured. I appreciate the Assistant Templates because I know that when I’m using one, I don’t have to sit and figure out what I mean to say – and I like the replication.”*
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Larry Qvistgaard – SMC Wealth Management/Cambridge Investment Research Advisors



Larry Qvistgaard is an OSJ and an advisor with SMC Wealth Management. Because Larry wears two main hats, he finds Mobile Assistant a great tool of success. Here’s what he has to say:

- *“I recommend Mobile Assistant primarily to the financial advisors in our OSJ. If I were to talk to other OSJs, it would be to help them more from a compliance standpoint. A lot of OSJs have to wear these two hats – we have our retail business and then our OSJ business. If I were really able to reinforce the value of Mobile Assistant beyond that of being an advisor, it would be that it ties in with my CRM, which is where my OSJ business resides. In effect, I love what it does. I love being able to hang up a call, take my notes, recite my notes, and then throw away my notes.”*
- *“At one point, I had a meeting with a VIP of mine. I had dictated the notes after the meeting, but later on I forgot that I had dictated. I went hunting high and low for my notes. I popped into my CRM and found all the data and details I needed – and Mobile Assistant helped me*

accomplish that. I can only imagine an advisor who has over 200 families to represent and how they would keep on top of all those details.”

- *“Whether you’re an OSJ or a financial advisor, Mobile Assistant helps you memorialize your calls and meetings with your clients – and very quickly.”*
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Todd Marquardt – Marquardt Wealth Management/LPL Financial



Todd Marquardt is a highly valued advisor with Marquardt Wealth Management/LPL. If an advisor wants to learn from the best, see what Todd has to say about partnering with Mobile Assistant:

- *“From a standpoint of everything being compliance-driven these days, for all of our advisory accounts, we have a form here at LPL called the F450. So, now that I have Mobile Assistant, I just pull up that form inside my Talk It app. Having the Assistant Template in place of the paper form makes my notes so much more concise and detailed out.”*
 - *“When I have an audit, the examiner just basically takes over my computer and generally looks over a sampling of my clients. At my last audit, by the time she had looked through those examples, she said that I was good to go and could see that I was doing everything perfectly in way of documentation. My attestation is taken care of and it makes life so much simpler and easier.”*
 - *“The biggest and best part of having Mobile Assistant is getting the time back from what used to be a very drawn-out process. Everyone says that it saves time – but that’s exactly what it does! I despise typing notes. With Mobile Assistant, I can just speak my notes in a concise manner, and I don’t have to type anymore.”*
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LIVE COACHING SESSION