

Text Messaging with MyRepChat

Cetera is extremely excited to announce that we have partnered with [MyRepChat](#) as our new compliant text messaging provider. MyRepChat is unique to this space as the only text messaging solution that was created and designed by a financial planner with a specific focus on the financial services industry.

MyRepChat gives you the ability to enhance your communication strategy:

- Create templates for commonly used messages
- Schedule messages in advance
- Integrate with MarketingCentral to share content via text message
- Integrate with your CRM platform

[MyRepChat Brochure](#) | [Recorded Demo of MyRepChat](#)

Frequently Asked Questions

How much does the texting platform cost?

The monthly subscription cost for MyRepChat is \$10 for Cetera-affiliated financial professionals. MyRepChat will collect your payment directly; you'll be prompted to add your payment method during the sign-up process. Cetera will not be involved in billing.

How do I get started?

To get started with MyRepChat, click [here](#) or contact 844.402.2428. Be sure to let them know your specific broker-dealer affiliation.

What should be included on my virtual business card (Vcard)?

The virtual business card you can set up under MyRepChat's Settings > Profile menu serves as an electronic format of your paper business card. We recommend you include all information that you're prompted to personalize (name, company name, title, email, address, phone number). You will also be required to enter your broker-dealer's disclosure in the notes section—this will be the same as what appears on either your approved email signature block or printed business card.

Can I send pictures to my clients or receive pictures my client sends?

You can send photos and PDFs via MyRepChat. You should never share or ask clients to share photos that contain personally identifiable information (PII) such as a driver's license, passport, etc.

Can I text multiple phone numbers or groups?

You can text up to 25 contacts at one time. The contact receives an individual message; there is no group message functionality. Please note: you are required to send communication to Advertising Review for approval if you plan to send the same message to more than 25 contacts in a 30-day period.

How long does it take to receive a text?

Texts are sent and received immediately once your MyRepChat account is set up and approved. The contact information on your account will route to Ad Review for approval in the MyRepChat platform.

What do I do if a client does not respond to an opt-in request?

Upon your first message to a contact, they will be required to give positive consent and opt in to receiving further messages. If they do not respond, reach out via email or phone call to ask them to respond to the request with YES.

Do templates saved in MyRepChat need to be reviewed by Advertising Review prior to use?

Yes. Please send any templates for text message communications to Advertising Review through your normal approval process prior to use.

Can my Admin use MyRepChat?

Admins can be set up with an additional login to access the registered representative's account. However, the vCard should reflect the registered representative's name as it is essentially his/her business card.