

RW Paul & Associates

Office 365, Social Media, & Website Archiving

RW Paul & Associates, LLC, is a registered investment advisory firm based in Detroit, Michigan, specializing in retirement financial advising. The RW Paul & Associates team understands the importance of establishing trust with your financial advisor and strives to build and maintain close relationships with each client.

The company believes that retirement is a journey and works diligently to establish strong, long-lasting, and financially successful partnerships with their clients.

With a unique focus on capital preservation, RW Paul & Associates utilizes the best tools in the industry to help achieve future financial goals.

Combining income planning, institutional wealth management, and estate planning strategies, they offer 25 years of experience and success. A small business of under 20 employees, RW Paul & Associates strives to give each and every client the best and most personal attention they deserve.

Identifying the Right Solution

In light of data archiving laws, RW Paul & Associates wanted a one-stop shop compliance solution for their firm. As a small business, they wanted a solution that was both easy to use and efficient for surveillance and digital archiving, and one that wouldn't take valuable time away from their clients.

RW Paul & Associates selected Erado to archive and monitor all activity on email and the three main social media platforms—LinkedIn, Facebook, and Twitter—as well as the firm's website, www.rwpaul.com.

"Our mission is to help our clients make safe decisions and smart investment choices for their future. So why wouldn't we strive to do the same for our company?" said Matt Paul, Certified Financial Planner and Case Design Specialist for RW Paul & Associates.

"Erado was the safest choice and smartest investment we could make."

MATT PAUL

*Certified Financial Planner
and Case Design Specialist for
RW Paul & Associates*



Deploying Erado's Solution

"Office 365 was one of the primary reasons for choosing Erado," Paul says. "Unfortunately our previous provider had a lack of archiving and compliance solutions. After doing a little bit of research, it was an easy decision for which electronic compliance company was the best choice for a small and personalized firm like ours. Now, we are able to utilize all the advantages of Office 365, archiving and encryption services through Erado."

RW Paul implemented a full package of Erado's products, including Office 365, social media and website archiving, and surveillance, allowing the firm to archive and access all electronic communications and stay in compliance with the stringent regulations set by FINRA and the SEC.

Throughout the implementation process, Paul and his team were able to regularly engage with Erado while learning the system and its capabilities.

"Erado was there when we needed them. They really know the meaning of customer service, and we can trust that the system is working behind the scenes so we can focus on what is really important—our clients."

MATT PAUL

Certified Financial Planner and Case Design Specialist for RW Paul & Associates

Benefits

- Patented technology and proprietary software
- Unlimited archive to meet evolving communications needs
- Powerful eDiscovery with elastic search
- Intuitive data review with message level classification and activity history
- Data production capabilities to quickly produce risky, non-compliant and randomly sampled content
- High industry standards for securing archived data
- Superior customer support

Innovation

- 20+ years of experience and innovation
- First vendor to:
 - Archive social media
 - Archive embedded hyperlinks in social media
 - Capture third-party content in email
- Most established electronic communications archiving vendor

ABOUT ERADO

Now part of Zix

Erado offers unified information archiving solutions across more than 50 communication channels including email, social media, instant message, mobile, web, apps, audio and video. With more than 20 years of experience and more than 18,000 customers, Erado unified information archiving solutions help businesses comply with SEC, FINRA, FCA, and state and international regulations. It also provides supervisory, eDiscovery and reporting capabilities to save time and provide peace of mind. In addition, businesses across industries can ease the litigation process by using Erado's unified information archiving solutions to enable cloud access, create efficiencies in the review and production process and reduce costs.

SSAE 16 certified, Erado offers a cloud-based approach, and its solutions' features include integration with hosted and on-premises systems, elastic search parameters, message level classification and activity history, and flexible reporting and random sampling.

For more information, visit www.erado.com or call 866.673.7236.
