



Copytalker™

The functional equivalent of embedding a live transcriptionist on your screen!

Imagine if an attorney neglected to document material facts of a case, or a doctor failed to document a physical exam. With a fiduciary duty to serve your clients' interests, you're the financial equivalent of the attorney or physician who holds the well-being of others in their hands!

Is it any wonder regulators are adamant about memorializing all client conversations? And "adamant" may be an understatement: Since 2017 they've imposed \$200+ million in fines against financial institutions for failing to adequately document client meetings.

With its newly-released Copytalker™, Copytalk, the leading provider of transcription services to financial-service institutions, now provides to enterprises a seamless user experience of voice-controlled note taking and form completion. Copytalker™ is aptly named: Just talk naturally. Copytalk will transcribe the freeform dictation in whatever customized format the enterprise requires for integration into its digital workflows.

"We'll adapt to accommodate any platform enterprises are using to manage their books of business," said Copytalk CEO Maree Moscati. "Which means that not only are we creating basic transcripts of recorded audio, but our system can intelligently handle the content within these transcripts and automatically update other systems in your workflow with the pertinent information." For example: When creating a transcript, Copytalk can automatically update a contact within a CRM.

Copytalk has removed the last barrier to consistent and thorough documentation by allowing enterprises to provide their team with a built-in, one-touch dictation service in a secure, private and integrated manner. Once a dictation has been submitted, the voice file is processed by live transcriptionists fluent in financial terminology and working in secure, U.S.-based facilities.

"Eliminating the phone call produces substantial value," said Moscati. "The convenience of one-touch dictation will encourage advisors and wealth managers to document more of their ideas. If even one material fact or great idea is kept from falling through the cracks, the benefit could be dramatic. Consider the value of saving *all* material facts and *all* great ideas!"

Finally, in Copytalker™ Copytalk has built an application that advances its strategy of fintech integration. "The best financial institutions equip their advisors with menus of the most promising fintech offerings," said Moscati. "Because thorough documentation is so essential, Copytalker™ belongs on this menu!"