



# **Modernizing Secure Communication** for Raymond James

Raymond James is renowned for its client-centric approach and commitment to innovation. At DataMotion, we understand that secure, efficient communication is the cornerstone of exceptional client experiences. Our Secure Platform is designed to enhance security, streamline operations, and maintain compliance, while also leveraging cutting-edge technologies like JenAl Assist to support your digital transformation goals.

## Revolutionizing Secure Messaging for Raymond James

Your advisors and clients rely on seamless, secure interactions to build trust and deliver exceptional service. DataMotion's Secure Platform ensures:

#### Secure Messaging

conversations and document exchange with clients.

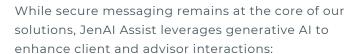
#### **Streamlined User Experience**

Facilitate confidential, bi-directional Enable advisors to focus on building Support client communication relationships, not navigating complex tools.

#### Scalability for Global Reach

across diverse regions, from Spain to Switzerland and Miami.

## JenAI Assist: Supporting Smarter, Secure Interactions





#### Al-Driven Efficiency and Client Support

Automate tasks and provide quick, secure responses to client inquiries, freeing up advisors to focus on strategic relationships.



### **Workflow Automation**

Simplify document handling and client onboarding with Al-enabled, secure forms.

## Seamless Integration with Existing **Systems**

Our solutions integrate effortlessly with Raymond James's existing tools and processes, ensuring minimal disruption and maximum efficiency:



Embed secure messaging within your CRM to enhance workflows and user experience.

**API Customization** 

Extend and embed functionality across platforms for a unified, efficient experience.

Grow your secure communication infrastructure alongside Raymond James' evolving needs.

## **Driving Client and Advisor** Satisfaction

By prioritizing secure communication and Al-driven enhancements, Raymond James can:





Reduce Contact Center Calls: Enhance selfservice capabilities, leading to fewer support inquiries, improved efficiency, and a quicker ROI.

## Simplifying Compliance and **Enhancing Security**

In financial services, security and compliance are paramount. Our platform safeguards every interaction with military-grade encryption through a Zero Trust Architecture, while maintaining audit-ready logs to meet regulatory requirements. Additionally, customizable message retention periods ensure that client needs are addressed, simplifying compliance management and reinforcing your commitment to industry standards.

By implementing DataMotion's Secure Platform, Raymond James will benefit from best-in-class messaging solutions that strengthen communication security, simplify compliance management with audit-ready tools, and harness the power of JenAI Assist to enhance efficiency and client support.



Let's Collaborate on Raymond James's Success

**BOOK A MEETING** 



48%

Efficiency gain by integrating DataMotion.



DataMotion is a trusted leader in secure, compliant data exchange for regulated industries. Our innovative platform seamlessly integrates secure messaging, file transfer, and GenAl-enhanced capabilities across workflows, systems, and communication channels. With a foundation in Zero Trust architecture, DataMotion empowers organizations to protect sensitive information, improve operational efficiency, and deliver exceptional customer experiences.

Trusted by Fortune 500 companies, we simplify complex data challenges, offering flexible, scalable solutions that adapt to your unique needs. Whether embedding secure messaging into portals or streamlining email encryption to enhance third-party systems, DataMotion ensures every interaction—human or Alassisted—is secure, compliant, and efficient.



# **CONTACT SALES**

We are excited to help Raymond James modernize secure communication, elevate client trust, and support your advisors with the tools they need to succeed. Let's work together to tailor our solutions to meet your unique needs.