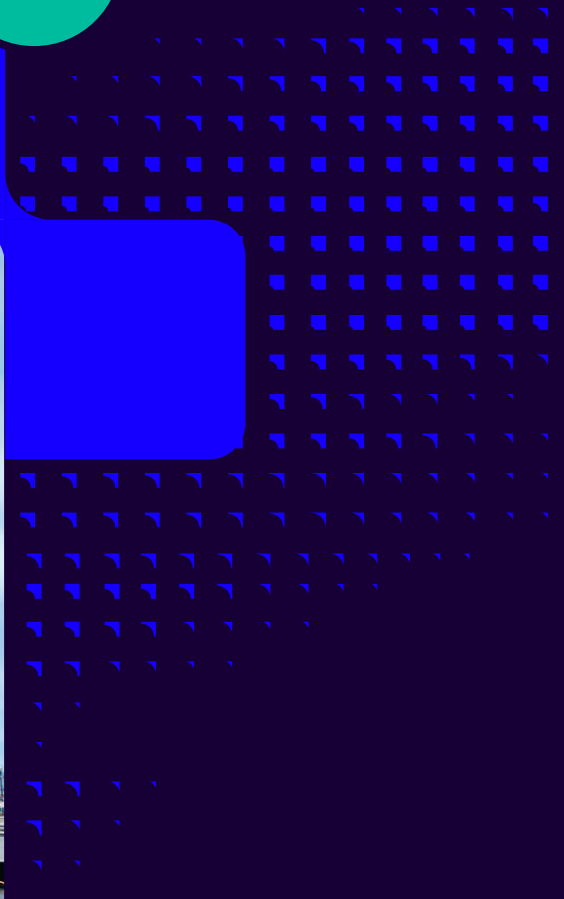
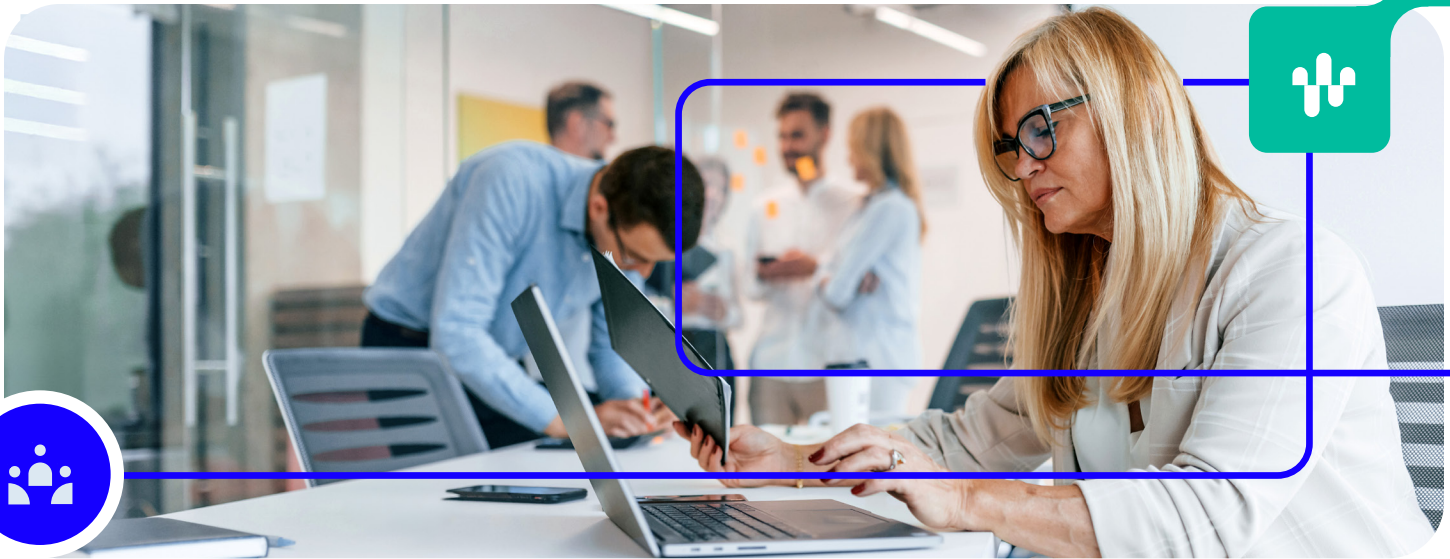




CUSTOMER STORY

Crestwood Advisors Seamlessly Adopts Smarsh





Customer profile

Crestwood Advisors, formerly known as Endurance Wealth Management, is a registered investment advisory firm located in Providence, Rhode Island. Regulated by the SEC, the firm must retain and supervise all electronic communications, including email and social media.

The Challenge: Expanding communications

Crestwood Advisors' Chief Compliance Officer, Tom Gardner, knew he had to consider switching from his legacy supervision and archiving platform. The firm ingested more than 1,000 emails per day, and social media activity was increasing. Gardner wanted to weigh his other options and to then choose the best solution.



With Smarsh, you feel as though you're an important client no matter the size of your firm."

Tom Gardner
Chief Compliance Officer
Crestwood Advisors



The Solution: Compliance simplified

After learning about Smarsh at an industry event, Gardner saw a demo of the platform and appreciated the customer support Smarsh offered, as well as the simplicity of the platform.

The Outcome: A trusted partner in Smarsh

Gardner moved all of his firm's data from his previous provider to Smarsh. Gardner now enjoys both exceptional customer services from Smarsh, as well as a powerful but user-friendly system that he can easily navigate.



Working with Smarsh is a real pleasure. I used the webinars early on to get up and going. I appreciate that when I have a technical question, I can speak to my account manager and receive an immediate answer.”



Smarsh® enables companies to transform oversight into foresight by surfacing business-critical signals from the most in-demand communications channels. Regulated organizations of all sizes rely upon the Smarsh portfolio of cloud-native digital communications capture, retention and oversight solutions to help them identify regulatory and reputational risks within their communications data before those risks become fines or headlines.

Smarsh serves a global client base spanning the top banks in North America, Europe and Asia, along with leading brokerage firms, insurers, and registered investment advisors and U.S. state and local government agencies. To discover more about the future of communications capture, archiving and oversight, visit www.smarsh.com.

Smarsh provides marketing materials for informational purposes only. Smarsh does not provide legal advice or opinions. You must consult your attorney regarding your compliance with applicable laws and regulations.

Customer Story - 10/25

