



McLaughlin Ryder
Investments, Inc.

CUSTOMER STORY

McLaughlin Ryder Saves Time with Smarsh Professional Archive



 **smarsh**

Customer profile

McLaughlin Ryder Investments, Inc. helps individuals and institutions achieve their financial goals, with a focus on providing expert and ethical investment advice with integrity and first-class personal service.

The challenge: Slow searches compromised compliance

Michelle Glicklin, principal vice president and compliance officer, is responsible for the compliance initiatives at McLaughlin Ryder. This included archiving, retaining and retrieving email communications.

Unfortunately, the firm's previous archiving solution wasn't up to the task.

"I used to get a lot of junk emails in my searches that I would have to wipe out and moving from one screen to the next when reviewing email was cumbersome," said Glicklin.

Adding to her frustration, Glicklin discovered how arduous it was to get support from the provider.

"I am the onsite IT person, and I manage the finances, operations, and compliance," said Glicklin. "Email is such an important, vital piece of business these days. With our previous provider, I was constantly on hold or directed to a different person. I couldn't get what I needed from customer service, and my searches were very slow."



The solution: Look to Smarsh for the right tools – and partner

While several solutions were considered, McLaughlin Ryder chose Smarsh for its positive industry reputation and comprehensive archiving solution.

Glicklin now spends less time on her email review using Smarsh Professional Archive. She's able to view everything on one screen while ensuring junk emails are removed from her searches.

Equally important, Glicklin feels she receives excellent customer service at Smarsh.

"Everyone has been instantaneously responsive," said Glicklin. "The longest I have ever been on hold with Smarsh is two minutes. Meanwhile, I'm still trying to resolve outstanding problems with our previous solution and getting nowhere."



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.

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1-866-762-7741



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