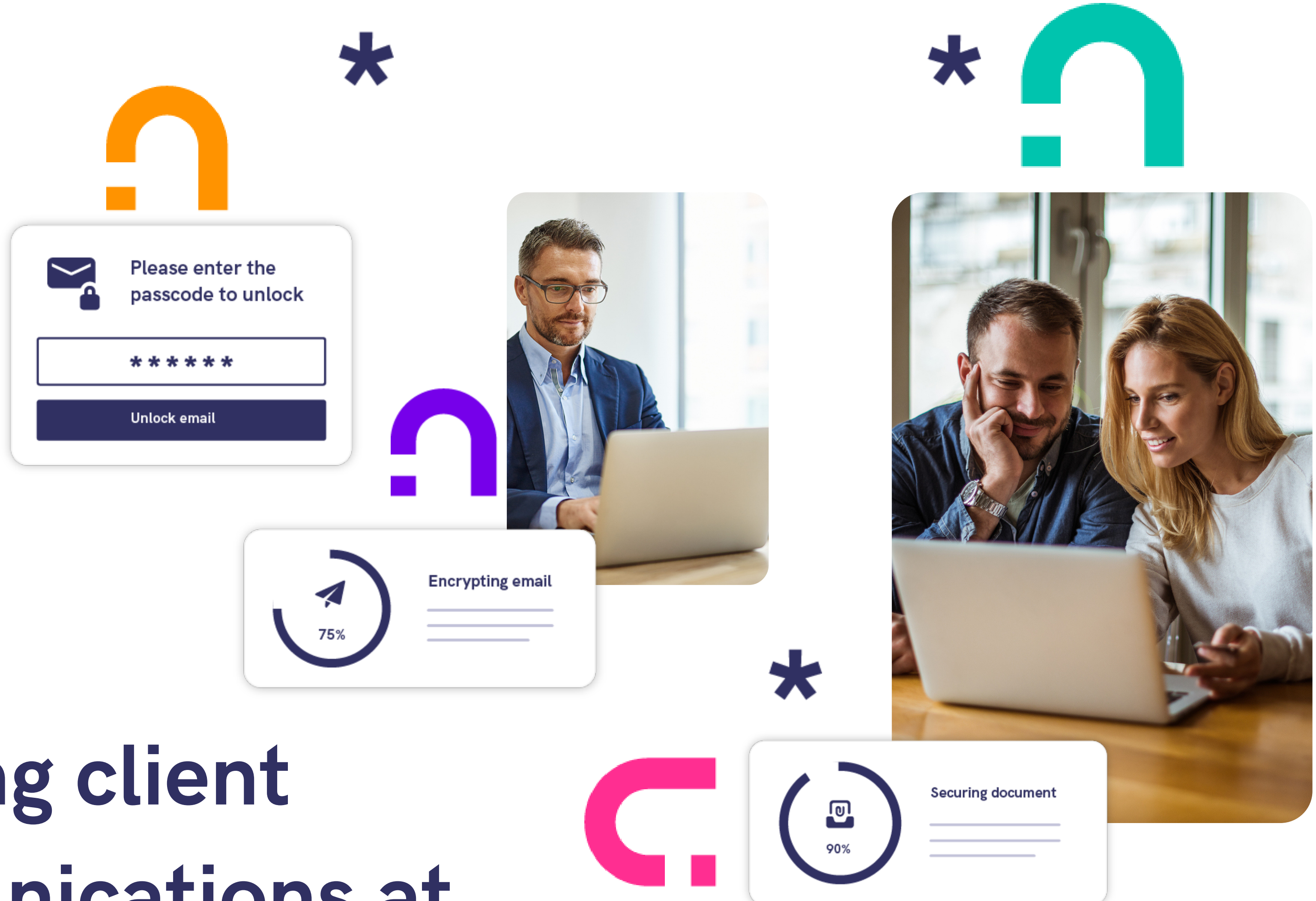

Beyond Encryption

CASE STUDY

Securing client communications at Thanks Wealth Planning

In 2020, 10% of data breaches happened within the financial industry, with 58% involving the loss of personal data

Personal information is abundant within financial services, making it a prime target for data thieves.

Financial firms are beginning to realise that the cybersecurity they have in place may not be enough to fully protect their client data.

This case study shows how Thanks Wealth Planning increased the security for their online communications.

10%

of data breaches in 2020 occurred within the FS sector

Who are they?

Thanks Wealth Planning are certified financial planners, assisting their clients with creating and carrying out bespoke wealth strategies.

Owned and directed by Sam Whybrow, Thanks Wealth Planning are specialists in wealth preservation, enhancement, and protection, with their expertise earning them the Top-Rated Financial Adviser accolade 3 years in a row.

'It sits in my email, and I don't think about it as being Mailock, I just think about it as being email. It hasn't changed the way we work.'

Sam Whybrow
Director, Thanks Wealth Planning

THANKS WEALTH PLANNING

Coming on board with Mailock

For financial service firms operating in the UK, it is vital to maintain compliance for FCA authorisation.

Thanks Wealth Planning, when completing the authorisation process in 2019, understood the importance of investing in the right security technology for their business to ensure they remained FCA compliant and protected confidential client data.

Mailock's encryption and authentication capabilities caught their interest, with Thanks Wealth Planning signing up without needing to consider any other solutions, stating that there was 'no reason not to use Mailock.'

Becoming part of the furniture

Since the start, Thanks Wealth Planning has been impressed by Mailock's value for money, describing the solution as 'cost-effective for the security it provides, for clients and for us.'

They appreciated how easy the software was to implement with their current workflows, especially Mailock's integration with Outlook. By installing the Outlook add-in, the need to use a separate app or provider to secure their emails was removed, allowing Mailock to become a seamless part of their everyday communication.

The Outlook integration also significantly reduces the chance of human error occurring, ensuring that Thanks Wealth Planning sends out the right email to the correct person, every time.

'It's a failsafe for me. I don't have a peer system for checking emails, so this acts as a second pair of eyes.'

Sam Whybrow
Director, Thanks Wealth Planning

Supporting every client

Providing excellent customer service is a number one priority for Thanks Wealth Planning, which is why Mailock's introduction as a method of client communication was incredibly important.

They report that the overwhelming majority of their clients have used Mailock from day one, stating that this alone is a testament to its customer experience.

'They appreciate that we are going above and beyond.'
– Sam Whybrow

‘Email is still the way most of our clients want to communicate. It’s been around for so long now, it’s just second nature.’

Sam Whybrow
Director, Thanks Wealth Planning

Tailored communication

As a small business, Thanks Wealth Planning enjoy having the flexibility to offer both a customer portal and secure email solution, giving each individual a personalised choice on which communication to use based on their preferences.

‘I differentiate client by client. Some clients still prefer using email and aren’t used to using a full portal yet.'
– Sam Whybrow

Although they provide a secure portal for their clients, Thanks Wealth Planning understand that sending emails is one of the most comfortable methods for people to use when getting in contact.

Total email security

Thanks Wealth Planning also make use of a host of other Mailock features, including:

Email auditing and tracking- enables full compliance and assists with client follow up.

Mailock’s trusted community- removes the need to repeatedly send authentication challenges to clients who have already been verified.

Security prompts- reminds the sender to secure confidential emails.

Free client access- offers secure and encrypted to-and-from communication between sender and recipient.

Client privacy, guaranteed

Mailock's secure email solution is the complete package for businesses looking to take their client communications to the next level.

Discover what Mailock can do for your business.

Find out more

beyondencryption.com