

The best business phone system for financial services.



Financial advisors, planners, and associates need to be responsive and connected to keep clients happy. Whether discussing a financial product with existing or new customers, Ooma Office helps them manage calls better while working from anywhere and reducing monthly costs.



Ooma Office, the #1 rated business phone service, provides the best value for financial services organizations.

✓ **24 x 7 Virtual Receptionist directs calls, provides helpful information.**

If you are unable to answer the phone when meeting with clients, or you're busy setting up new accounts, or it's after business hours, Ooma's virtual receptionist greets callers and provides answers to common questions. Your clients can reach the right team member in one or multiple offices. You can easily build menu options such as: Press 1 to reach the directory and specific advisors, Press 2 to make a payment, Press 3 for office or branch hours of operation. It's flexible and easy to update to fit your needs.

✓ **Never miss a business call when out of the office.**

Ooma's mobile app enables you to use your business number anywhere. Incoming calls are easily identifiable so you know which calls are personal and which are business. You can flip an active call from your desk phone to your mobile phone when you need to depart while continuing a conversation.

✓ **Simultaneously ring numerous team members.**

With Ooma Office, you can create customized ring groups that simultaneously ring advisors or associates whether they are in your office or out visiting clients.

✓ **Free toll-free and local numbers.**

Eliminate long distance charges on calls between locations. Enjoy free unlimited calling to Canada, Mexico and Puerto Rico, with low international calling rates to other countries. Free fax numbers enable you to fax multiple documents simultaneously.

Oswald Financial

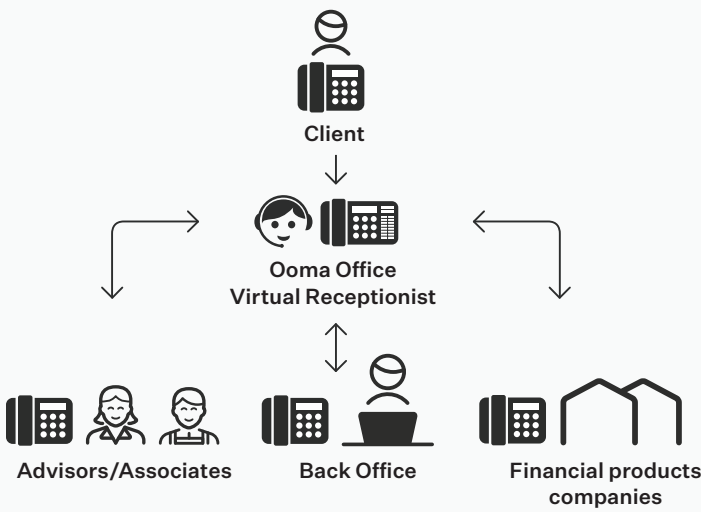
“ We switched from Spectrum. It's been the best decision, EVER! We seriously can't say enough about Ooma Office. We are a financial company that strives to provide the best customer service. Hands down Ooma Office has played a huge part in making that possible! ”

– Heidi W.

Whether you have one or numerous locations, Ooma Office is easy to install without disruption. You can port your previous phone number and easily manage and update the system remotely within the easy Web admin portal.

Financial services advisors, agents, and team members always stay connected to clients.

When clients call to schedule an appointment or inquire about financial services and investment options, their calls are answered immediately. It takes just seconds to park or transfer a call to the right staff members so clients have a great service experience, which builds loyalty and referrals. You eliminate big bills with surprise add-ons or complicated, inflexible systems that don't serve you and your clients. And there's highly rated 24x7 support if you ever need it.



With Ooma Office, you get all the business phone features that are perfect for meeting the daily balancing act of managing your clients and your financial firm. You always get clear, flexible, reliable communications that save money at one or multiple offices.

Ooma Office offers three service plans, designed to suit a variety of business needs. Pricing is all-inclusive with no surprise add-ons or setup fees.

		Most Popular	Best Value
	Ooma Office Essentials	Ooma Office Pro	Ooma Office Pro Plus
Price Per User, Per Month	\$19.95*	\$24.95*	\$29.95*
Features			
50+ Standard Features	•	•	•
Virtual Receptionist	•	•	•
Ring Groups	•	•	•
Music On Hold	•	•	•
One Toll-free Number	•	•	•
Digital Fax	•	•	•
Mobile App	•	•	•
Email Audio Attachments	•	•	•
Desktop App		•	•
Videoconferencing		•	•
Call Recording		•	•
Enhanced Call Blocking		•	•
Voicemail Transcription		•	•
Caller Info Match		•	•
Dynamic Caller ID		•	•
Google and Office 365 Integrations		•	•
Call Analytics		•	•
Call Queuing			•
Salesforce Integration			•
Hot Desking			•
Find Me, Follow Me			•

• Included

*Applicable taxes and fees are not included.

Unlike other providers, Ooma pre-provisions each phone so when you receive them, all you need to do is plug them in, log in, and you are up and running.

Call 877-959-6662 to learn more and get started today.

