

Carrington Investments

## London based wealth management firm Carrington Investments are now sending secure & registered emails for e-signature with Frama RMail



“In our industry, keeping data protected is paramount. We were referred to Frama in 2019 and invited Mike Roberts to come in and give us a demonstration. We were impressed by how easy the system was to use, and how it integrated within Outlook. We now send our emails encrypted and securely, ensuring that our client’s personal data is protected whilst providing peace of mind. The registered email functionality provides us with proof of content and delivery, and being able to send documents for e-signature has certainly accelerated our document signing processes.”

Nicola Craxton - Operations Director

### PROJECT

To provide Carrington Investments with a simple way of sending secure, registered and encrypted email to their clients with no awkward requirements on the recipients end, whilst also being able to keep a full audit trail for proof and compliance purposes.

### SOLUTION

Frama RMail - Microsoft Outlook plugin

### BENEFITS / ADVANTAGES

Simple and straightforward implementation  
Registered Receipt (Compliance Record) to prove email content, delivery and when opened  
Auditable Proof of Compliance  
E-Signature capabilities for client satisfaction  
Email encryption to ensure all client data is transmitted safe and secure for GDPR

### ABOUT CARRINGTON INVESTMENTS

Established in 1996, Carrington Investments is an award-winning financial planning and wealth management firm, focussed and dedicated to delivering exceptional service to private clients.

We think and act differently. We come to work every day to help people and that is what motivates us. We give clients the clarity to make key decisions with confidence, in the knowledge that we are working with them to secure their futures. Our advice is completely independent, and we invest our own money in the Carrington client portfolio’s, which means we all take the same investment journey.



In other words, our interests are totally aligned.



## THE STORY

The team at Carrington Investments not only needed a secure way of sending email, but they also wanted to explore the opportunities that came with this change, including the possibility of utilising digital transformation for cost savings and efficiencies.

Many solutions were made available to Nicola, however most email security solutions were clunky, and required the recipients to log in to portals, sign up for 3rd party cloud based accounts and log in to read messages.

Mike Roberts - head of Digital Services at Frama UK provided Nicola and her team with not only a simple way to encrypt emails, but also gave them a way of streamlining their business by accelerating the document signing processes using the inbuilt RMail e-signature facility.

With RMail, they now also benefited from registered email, providing the company with a legal forensic auditable proof of content, delivery and when emails were being opened.

## THE VERDICT

It might be easy to purchase portal based email solutions, but it is difficult to provide a system that is widely accepted from all involved parties and at the same time demonstrate compliance towards GDPR.

This is where Frama RMail performs!

Carrington Investments have implemented an easy to use, well featured and forward thinking solution to demonstrate compliance and to increase efficiency by replacing existing paper based workflows, whilst also ensuring their clients information is kept secure.

## CO-OPERATION AND ROLL OUT

Setup and installation was made available to the team, and each staff member received personal one to one virtual training from Mike.

