

COMPLIANCE NEWSLETTER

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BRSi[®]

March 4, 2025



BRSi Cell Phone Policy

We have been instructed by our Legal Advisor and our Errors & Omissions insurance carrier to update our policy and put strict restrictions/limitations on personal cell phone and/or social media use by BRSi personnel.

1. BRSi personnel should never conduct business through their personal cell phones (calls or texts).
2. BRSi personnel should never conduct business through any social media programs (LinkedIn, Facebook, WhatsApp, Instagram, etc.).
3. All BRSi business communications must be monitored, recorded, and maintained by our firm.
4. BRSi must review and document these procedures with our staff annually and we must attest when the review was completed.

Moving forward, we kindly ask you to use a BRSi business phone number (BRSi direct or general number) or BRSi email when you want to discuss business with any BRSi personnel. BRSi personnel will no longer be allowed to discuss (or respond to) any business inquiry if received through their personal cell phone number. If they receive a business call or text to their personal cell phone number, we have instructed our employees to respond by giving out their BRSi direct line and email address for you to follow up. A listing of each BRSi employee's direct line is stated in their email signature line.

We apologize if this is an inconvenience. However, it is in everyone's best interest if all business is conducted, monitored, and maintained through business channels.

Thank you for your cooperation.

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