

Secure, compliant email signatures for financial services

Email signature governance made for financial services IT

Financial services firms rely on email for critical tasks—confirming trades, issuing statements, responding to audits. But inconsistent or incomplete signatures create compliance risk.

Exclaimer gives IT full control from a single platform, reducing manual work, tightening oversight, and standardizing every message across teams, devices, and entities.



The signature challenges for finserv IT

In a regulated environment, outdated or inconsistent email signatures aren't just an inconvenience—they're a liability.

Without centralized control, finserv IT teams face:

- Disclaimers missing from trades, audits, or regulatory emails
- Outdated titles, licenses, or credentials after staff changes
- Inconsistent branding across desks, regions, and devices
- Delays updating disclosures by entity or jurisdiction
- Compliance and marketing relying on IT for updates
- No audit trail to prove what was sent or when

Manual email signature processes slow teams down and create gaps that put compliance at risk.

Exclaimer for financial services

Consistent. Compliant. Controlled.



Key features & benefits:

- **Centralized email signature management** – Control every email signature by department, region, or legal entity—no scripts or templates needed.
- **Automated compliance enforcement** – Apply region- or role-specific disclaimers to support FINRA, SEC 17a-4, GDPR, and GLBA compliance—automatically.
- **Standardized branding across the organization** – Ensure every message includes approved legal content and accurate sender details across all platforms and devices.
- **Fewer support tickets** – Roll out updates in minutes. Email signature issues no longer escalate to IT.
- **Audit-ready change tracking** – Full version history for legal and compliance reviews.
- **Directory sync** – Use Entra ID (Azure AD) or Google Directory data to assign the right signature to the right person.
- **Safe delegation with RBAC** – Let Legal or Marketing update content without giving up IT oversight.

How it works: Four steps to full control

1. Launch your account

Quick setup with onboarding support if needed.

2. Create your signature templates

Use our drag-and-drop editor or predesigned layouts tailored for different purposes.

3. Configure deployment

Set logic by job title or region.
Updates go live instantly.

4. Delegate safely

Apply Role-Based Access Controls (RBAC) to control who manages layouts without adding risk.



Trusted by financial institutions worldwide



Exclaimer processes 20+ billion email signatures for over 70,000 organizations annually—including global financial firms.



“Great way to standardize signatures for branding and compliance, and removes the need for employees to manage their own signatures, for Compliance to approve them for Marketing to approve them, for Technology to teach people how to do it, and for our MSP to have to write scripts to handle our many disclosures. That's a lot of people who don't have to worry about signatures anymore.”

— Caite Stevens, XML Financial Group



Ready to take control of your organization's email signatures?

To

Subject

Regards,



Ravi Patel
Commercial Loan Specialist

T: +123 456 7890
E: patel@firstlinebank.com
W: firstlinebank.com



Ready to expand your business?



Ask about our commercial loan options.

Contact

Reduce IT workload. Support compliance. Stay consistent at every touchpoint.

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