

GET up to speed on Correspondence Archival. It's Quick and Easy!

We require all “material” transaction related correspondence be uploaded to LoadingDOCS along with the rest of your contract documents.

“Correspondence” includes agent emails, faxes, and conversation notes and logs relating to a transaction or prospective transaction. DOL has indicated that a brokerage only needs to maintain “material” correspondence to comply with the rule. “Material” correspondence is, at a minimum, all correspondence relating to contract formation, exercise of a contingency, termination, and other significant transaction events be maintained.

We have put together a list of several tools that you can use to convert text messages and emails to PDF files. Once your communications have been converted to PDF's, they can be easily uploaded to LoadingDOCS.

The process is relatively simple but varies based on the type of phone that you are using.

Android phone:

Install SMS Backup + to back up your text messages from your phone to your Gmail account.

[Backup Android Text Messages to Gmail \(VIDEO\)](#)

iPhone:

The iPhone requires a two-step process. Backup your iPhone to your computer via iTunes and then open the iTunes backup with Backup Extractor Program.

[Retrieve and Print Text Messages from iTunes \(VIDEO\)](#)

Print to PDF:

Portable Document Format (PDF) is the de facto standard for the secure and reliable exchange of electronic documents around the world. CutePDF Writer is a free PDF converter program. CutePDF Writer installs itself as a “printer”. This enables virtually any Windows application (must be able to print) to create PDF documents.

Watch [Short Video](#) and then [DOWNLOAD!](#)



ANDROID



iOS

