

MAREE MOSCATI

CEO, COPYTALK



Leading with Integrity & Trustworthiness

Maree Moscatti is the CEO of Copytalk, a transcription service dedicated to meeting the security and privacy needs of the financial services industry. Before assuming the firm's leadership in 2012, Maree spent decades in the industry, first as a financial planner, then as a coach for others as a regional sales manager, and later as a president and CEO in wealth management and trust services.

A Laboratory Institute of Merchandising graduate, Maree completed all certified financial planner courses at Florida State University. She held the FINRA Series 24, 7, and 63 licenses and has earned the coveted Shared Assessments Certified Third Party Risk Professional (CTPRP) designation. Under Maree's leadership, Copytalk has become the premier provider of secure mobile dictation to hundreds of thousands top financial institutions and prominent enterprises in other sectors.

Maree understands that personal integrity and trustworthiness enable investment professionals to succeed, and she and her firm are dedicated to helping financial advisors meet their client commitments. Grateful to the mentors who helped her throughout her career, Maree now spends considerable time coaching and inspiring younger generations, especially younger women, looking to have rewarding and meaningful careers in financial services and technology. Maree would tell you that she has had many influential leaders that she has been blessed to have in her professional journey. Her inspiration comes from all around her, so it's not just one person. She has learned from so many great leaders, but she undoubtedly relies on her true self to take that influence and mold it to develop and blossom into the unique and inspiring leader she is today.

The pioneering leader has many unique qualities. She is always very inspiring and allows all her staff to contribute



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ideas and solutions and offer alternatives to possible better ways of doing tasks. Her policy is an open door where anyone can ask her questions, get advice, or offer up what is on their minds as it relates to the Copytalk business. Where most firms have a separation between divisions, such as Development and IT and Sales, one of Maree's most outstanding qualities is that she brings the entire firm



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together, always stating, “The wheel must always be turning in the right direction – it can't move freely if any of the spokes are broken and uninformed!”

Maree is a tremendous believer in education. All management (whether senior or mid-management) have all come through the ranks within the firm. She believes in organically growing the firm, encouraging all to stretch their limits as possibilities are endless. She takes her time coaching and mentoring her team members but never micro-managing. For the steadfast leader, success comes when leaders can guide their employees with utmost dedication and integrity. “Success is individually unique based on one's goals and definition of success. For me it is being a professional with intensely high energy and creativity. So, success came over the years as I engaged in each next step of my journey,” says Maree. “I found success in learning from the very beginning of my career path into management that I didn't need to be “one of the boys.” It took a bit of scraping my knees and elbows, but without challenges and evaluating how to overcome them, there would be no success. One must have the confidence to take educated and calculated risks that make sense and be willing to make adjustments along the way for the benefit of the good.”

With this brilliant mindset, Maree is taking the company to new heights. Copytalk's transcription services are engineered to meet rigorous standards of accuracy and privacy in the recording of dictated meeting notes and the preparation and delivery of transcriptions. Its Mobile Scribe transcribes dictation on the go, while DigiScribe transcribes everything from meeting notes to conferences to uploaded media. The company's most outstanding achievement will consistently be delivering the services, processes, and security mandates their clients expect from them. Developing their first patent-pending technology, The Copytalker, has been a huge success and achievement that has been widely received and adopted by the most prominent institutions.

“Copytalk is because we offer unlimited dictation for a flat monthly fee. Since the inception of our Mobile

Scribe product, we've striven to break down barriers to documenting and capturing information. Offering an unlimited-use plan is just one more way we attempt to lead the industry for financial services transcription. Additionally, we are the only mobile transcription firm to be a long-standing member of The Shared Assessments Organization, which sets the standards in third-party vendor risk management,” adds Maree.

For the days to come, Maree and her team are looking towards accomplishing various goals, including always staying on top of what the client's needs are as it relates to transcription and simplifying the process so the clients can spend more time doing what they do best whether its professionally saving time or personally enjoying more free time. “We will continue to forge ahead in delivering the most reliable, secure, and accurate transcription services,” explains Maree.

This means continually holding focus groups to determine needs, desires and how to simplify their documentation While adhering to industry regulations in the easiest, most cost-effective manner. Copytalk prides themselves on doing this while maintaining the highest of security and privacy protocols in the industry.

As their newest innovation, Copytalk has launched the Dictation Guides feature in the Copytalk+ app.

Dictation Guides allows their subscribers customize their user experience to make sure they will never forget the key points to hit at each meeting, whether they always need the same information or have different needs for different conferences and clients. Instead of generic lists, Dictation Guides allow users to add Objectives with the language that helps them remember what information is vital for their practice. They can tailor Dictation Guides for their unique working style. ITO

Copytalk, LLC has been a leader in Transcription Services since 2001 and is touted by the most prominent corporations in regulated industries. To reach Copytalk and to learn more about their offerings, please contact them at :enterpriseconciierge@copytalk.com or 866-267-9825