

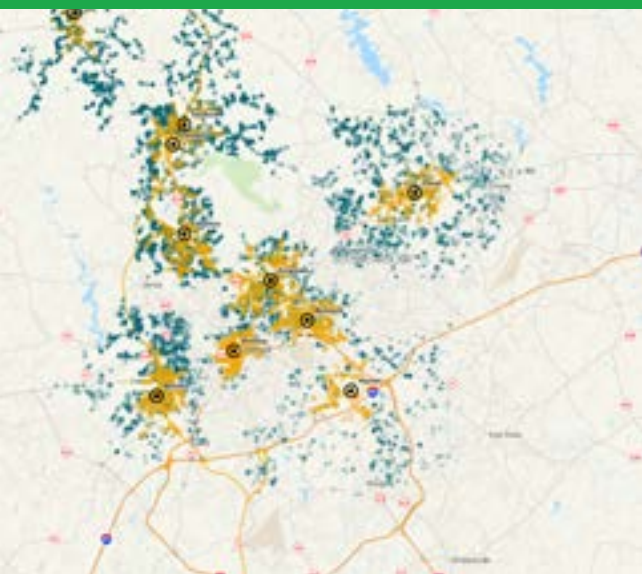
Deposit Account Growth Strategies

CHECKING ACQUIRED™



DEVELOP NEW OPPORTUNITIES TO SERVE YOUR COMMUNITY AND ACHIEVE SUSTAINABLE GROWTH

*Data-driven market intelligence and
insights to grow market share*



Building deeper relationships with account holders is crucial for the future of community-based financial institutions. Intense competitive pressures from larger banks and fintechs, addressing the barriers for consumers to easily switch their primary checking relationships, and fluctuating interest rates remain some of the most challenging obstacles.

Gain an ADVANTAGE with our holistic approach, which enables you to launch a successful strategy to increase core checking accounts and achieve the coveted Primary Financial Institution (PFI) status among your account holders. By leveraging the right data and analyzing critical elements that best correlate to new account openings, we help you target the right consumers to reduce overall expenses and increase ROI significantly.



Our all-inclusive approach includes in-depth market analysis, strategic consulting, expertly crafted and executed customized campaigns, staff training, and ongoing analysis and reporting.

From start to finish our turnkey model offers an efficient and cost-effective approach to core deposit account acquisition to let your team focus on its primary responsibilities while reaping the benefits of strategic marketing campaigns.

PROGRAM HIGHLIGHTS



In-Depth Market Analysis

- » Data-led evaluation
- » Analysis of your branch footprint
- » Identification of competition and market
- » Data-driven targeting criteria



Customized Training

- » Professional instruction for frontline staff
- » Coaching on account holder communication and cross-selling
- » Customized materials and workbooks



Strategic Consulting and Expertise

- » Advice on compelling offers
- » Digital and social media consultation and fulfillment
- » Personalized direct mail campaigns
- » Address CRA/underserved market requirements



Growth and Measureable Outcomes

- » Campaign optimization
- » A/B strategy testing
- » Mapping results
- » ROI analysis and reporting

To request more information or a complimentary market assessment, contact your local representative or visit advantage-fi.com/checkingacquired

