

Bundlefi[®] Solutions

Customer acquisition... simplified.

Who We Are

Bundlefi is an effective customer acquisition solution for community banks.

We were built by bankers for bankers, and believe community financial institutions provide the best options for banking products and services. Our goal is to help grow your business through customer acquisition and client retention.

We do this by delivering qualified customers directly to your door – making it easy for you to engage with them. The result is more accounts opened and long-term banking relationships built. Bundlefi makes marketing and growing your community bank simple, efficient, and cost-effective.



The Bundlefi Process

Our process begins with strategic digital marketing. We use advanced targeting methodologies to engage in real time with consumers who are actively engaged in the buying cycle, seeking banking services from community banks. When consumers click our ads, it brings them into a journey where we collect their personal information and account preferences so our algorithm can present to them the best bank with the best product for their needs.

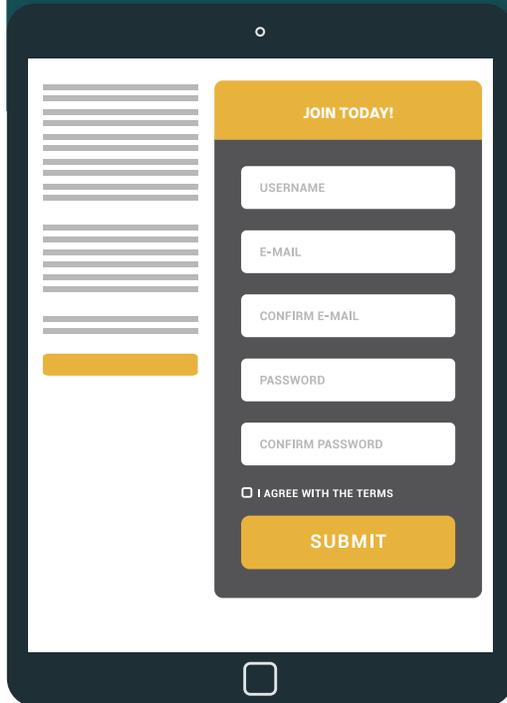


We believe banking should be more than just selling products, it should create long-lasting relationships between people and their financial institutions. That's why Bundlefi does more than just generate leads. Our services help to educate consumers to the value provided by community financial institutions, to build brand awareness for our platform clients and to facilitate connections with consumers searching for new banking relationships in real time.

Bundlefi was created to level the playing field between community financial institutions and mega banks.

—Greg Pellitteri, CEO Bundlefi

Matched users will be **delivered directly to your online account opening process, and you'll be notified.** You'll also receive personal contact information to help you make the initial connection and follow up with your new customer.



JOIN TODAY!

USERNAME

E-MAIL

CONFIRM E-MAIL

PASSWORD

CONFIRM PASSWORD

I AGREE WITH THE TERMS

SUBMIT



As a **Bundlefi member**, you'll have access to our proprietary data management platform, the Bundlefi ELS, where you can dive deep into valuable data about consumers who have selected your financial institution. You'll also be able to access the consumer data of those pre-qualified users in your market who were matched with your financial institution but didn't open an account.

Knowing more about your prospects and customers, and how to reach them, is the first step to developing long-term relationships.



All **Bundlefi member plans also include remarketing services.** We'll continue to target online users who have made it through the consumer journey to visit your website but have not yet opened an account. Statistics show that consumers who've been retargeted with ads about services or products they've already seen on the web are 50-60% more likely to convert, and when the initial marketing efforts specifically target actively-searching consumers, Bundlefi is able to help increase your institution's account open rate at a much lower cost per acquisition.

At Bundlefi, we're experts at marketing to the specific customers that community banks are looking for, and who are looking for them. We understand what sets community banks apart from megabanks and have deep expertise in consumer engagement, leveraging the power of digital marketing, SEO, and social media.

As a result, we're able to target the right audience with a regular flow of content and social media messaging designed to educate consumers as to why they should bank locally. This helps local financial institutions get in front of potential customers when they're ready to open an account for the first time or find a new banking partner.

Your success is our success.

That's why, to ensure you get the most out of your partnership with us, every one of our platform clients is assigned a dedicated account management team responsible for the overall success of your marketing campaign. A regular status meeting scheduled at your convenience and meaningful monthly reports ensure you're always apprised and in control of how Bundlefi is helping you grow your business.

Next Steps

Let's continue the discussion. We'd love to answer your questions and provide more details about how partnering with Bundlefi will be the best marketing decision your community financial institution has ever made. Growth and long-term customer relationships are our goal for you, and our software and unique marketing strategy is how we'll reach it together.