



Quickly, Securely Migrate Direct Deposits and Recurring Transactions with Automated Switching

Fifty-nine percent of consumers think switching financial institutions is “too much of a hassle.”¹ Make it simple for your account holders to instantly fund and transfer primary accounts to your financial institution using ClickSWITCH.

You spend time and money to acquire new checking account holders, many of whom remain inactive due to the inconvenience of moving recurring payments and deposits from their previous financial institutions. ClickSWITCH enables your account holders to quickly, safely and securely switch primary accounts to your financial institution. This account holder acquisition technology revolutionizes the way your financial institution can attract and retain new primary account holders by automating, streamlining and simplifying the process of bringing new account holders on board.

With ClickSWITCH, account holders don't have to complete multiple forms or payee notifications. The process is automated and takes as little as 10 minutes to initiate a switch. Account holders simply log into the white label ClickSWITCH portal, where they can switch their direct deposits and automatic payments from their former financial institutions to yours using a mobile device or personal computer. Once the switch is completed, they receive a real-time confirmation email. When they are done with the process, ClickSWITCH will even close the legacy account for the new account holder. Account information is transferred instantly, paving the way for a smooth and speedy transition. It's automated, faster and easier than ever before.



Key Benefits For Financial Institutions

- ✓ Reduce inactive accounts and obtain additional primary account holders
- ✓ Increase customer growth, retention, and cross selling opportunities
- ✓ Improve switch process efficiency
- ✓ Increase revenue stream from deposits and primary account holders
- ✓ Deepen relationship with account holders with fast and easy on-boarding

¹ Consumersunion.org, *Trapped at the Bank, Removing Obstacles to Consumer Choice in Banking*, May 30, 2012

It's Fully Automated, Convenient and Takes As Little As 10 Minutes!

Process



Log in

Account holders simply log in to the white label ClickSWITCH portal.



Choose

Switch your deposits and automatic payments to your **new or existing** financial institution.



Switch

In as little as ten minutes the account switch process is complete. Leave the rest to us.



Close

Once the account switch process is complete. **ClickSWITCH can even initiate the closure of the legacy account** for the new account holder.

Features



Fully Automated Online Solution



10 Minute or Less Switch Process



White Label



Paperless



Easy Implementation



Biller Database



5 to 15 Day Switch Completion



Real Time Switch Confirmation



Representative Training



Balance Assist



Account Closure



Account Management

A change of only

1%

in retention can fund an entire onboarding program

Harland Clarke, Marketing Services and Industry Database, 2011

Fewer than

1/2

of all new checking accounts are activated within the first **90** days of acquisition

BAI, With Onboarding, Cash Management Rules, October 31, 2014

Proper onboarding practices can help boost checking account profitability an average of

\$212

per customer annually

Javelin Strategy & Research, Convert "Silent Attrition" into Banking Engagement and Profits, February 2015

"Active" account holders are

4X

more likely than "inactive" customers to identify their new bank or credit union as their primary financial institution

Harland Clarke, Marketing Services Industry Database, 2011

Contact Us

To learn how ClickSWITCH can help your account holders quickly, safely and securely switch recurring payments and deposits to your financial institution.

Call: 612.424.5350 | Visit: www.ClickSWITCH.com | Email: Sales@ClickSWITCH.com
 Schedule a Demonstration: <http://www.clickswitch.com/contact>

< ClickSWITCH >