

## EMPOWERING COMMUNITY FINANCIAL INSTITUTIONS TO THRIVE.

At Bundlefi, our mission is clear: to empower banks and credit unions to thrive in a rapidly evolving digital world. We believe that community financial institutions play a vital role in their local economies, and we are dedicated to providing them with the tools and expertise they need to attract customers, grow their businesses, and make a positive impact on their communities.

### The Power of Partnership

Partnering with Bundlefi provides your organization with the resources and expertise you need to scale your marketing efforts quickly, at a fraction of the cost of building it alone. With our comprehensive suite of marketing services, industry expertise,

and innovative technology, we bring a unique blend of strategy, creativity, and results-driven solutions to help you achieve your goals and surpass your competitors. Together, we can amplify your brand and drive sustainable growth.



## WE FOCUS ON FINANCIAL

- **Expertise in the Financial Industry:** Specializing in serving local banks and credit unions, we understand the industry's challenges, trends, and regulations.
- **Tailored Solutions for Your Business:** Customized marketing strategies aligned with your unique goals, audience, and brand identity.
- **Comprehensive Range of Services:** A one-stop shop for all your marketing needs, saving you time and ensuring a cohesive approach.
- **Data-Driven Approach:** Strategies built on thorough research, market analysis, and data-driven insights for optimized results.
- **Creative Excellence:** Innovative designers, copywriters, and content creators captivate your audience and leave a lasting impression.
- **Partnership and Collaboration:** We are your strategic partner, valuing open communication, feedback, and shared goals.
- **Results-Driven Approach:** Measurable outcomes that drive growth and success for your institution.
- **Not Your Average Agency Experience:** As your agency, we are your strategic partner committed to your success. Unlock the full potential of your bank or credit union with our agency services that focus 100% on your brand.



# Bundlefi<sup>®</sup>

# COMPREHENSIVE MARKETING SERVICES

## Performance-based Marketing Program

Our exclusive proprietary consumer platform is designed specifically to engage consumers who are actively looking to open a new financial product including checking accounts, savings accounts, and more. We invest in driving this consumer traffic to our platform where we capture intent, verify identity and qualify each lead. Your institution is presented as a Bundlefi recommendation to qualified consumers looking to open a new account. Our platform delivers a seamless and engaging experience for your future customers, empowering them to explore your offerings, open accounts, and access financial services conveniently, all in one place.

With Bundlefi's proprietary customer platform experience you only pay for the leads delivered to your institution. We deliver a consistent flow of exclusive leads to your institution so you can confidently invest your resources in pursuing qualified leads that have a higher potential for conversion and long-term profitability.

## Full Suite of Marketing Agency Services

We understand the unique challenges faced by community banks and credit unions in an increasingly digital landscape. For less than a part-time employee, you can leverage an experienced team of digital marketers with years of experience in driving new account growth.

Bundlefi offers a comprehensive suite of marketing agency services to meet all your institution's needs. From developing strategic marketing plans to executing multi-channel campaigns, we've got you covered. Our team of experts excel in areas such as Search Engine Optimization (SEO), Paid Search (SEM/PPC), Social Media Marketing, Digital Display/Programmatic Advertising, Creative, and more. We leverage the latest industry trends and best practices to maximize your marketing ROI and drive customer acquisition.

## Brand Amplification

At Bundlefi, our focus is on your brand, not ours. We provide a range of services to highlight your institution's unique identity. Our branding experts will work closely with you to develop a compelling brand strategy that captures your institution's values and resonates with your target audience. Additionally, we offer paid search advertising services to boost your online visibility, create engaging landing pages that convert visitors into customers, and ensure consistent branding across all touchpoints. Your brand will take center stage, leaving a lasting impression on potential customers and setting you apart from the competition.

[Contact us to learn more about how we can help your institution thrive in the digital age.](#)

## Bundlefi ONE PARTNER FOR ALL YOUR MARKETING NEEDS

- 1. End to End Agency Services:** Access a comprehensive range of marketing services tailored to your institution's needs, including branding, programmatic advertising, paid search, captivating landing pages, and more.
- 2. Qualified Lead Generation:** Leverage Bundlefi's proprietary consumer platform experience and gain access to exclusive, fully vetted customer leads that have a higher potential for conversion and long-term profitability. Connect directly with consumers who want the products your institution offers and ensure a seamless and intuitive journey to open new accounts.
- 3. Industry Expertise:** Benefit from a team of experienced marketing professionals focused solely on the financial services industry, who understand the unique challenges and opportunities faced by community banks and credit unions.
- 4. Partnership and Collaboration:** Experience a true partnership where Bundlefi becomes an extension of your marketing team, working closely with you to understand your goals, challenges, and vision, and collaboratively achieving shared objectives.
- 5. Brand Building and Awareness:** Harness the power of cutting-edge marketing technology and showcase your institution's unique brand and values with fully customizable campaigns, landing pages, and digital assets that resonate with your target audience.