



“We save over \$100,000 a year by being able to track new money versus money just switching around.” ~ Matt Ebersbach



Case History: CRM

www.marssalessolutions.com

New Transparency Saves Money for Fifth Third Bank

Fifth Third Bank had a problem. The data from their Transfer Agent was not descriptive enough. They couldn't identify firms who were buying and selling their funds and couldn't track interactions with wholesalers. They knew this was costing them money and it needed to be fixed quickly.

When Fifth Third was looking for a solution, MARS stood out. “MARS is great. It is much easier to use than competitive products and their people really understand the finance industry,” described Matt Ebersbach, title.

MARS provided Fifth Third with more information that was logically organized. They were finally able to gain visibility into cash flows and financial transaction activity, including:

- Tracking underlying sub-accounts within fixed and variable annuity products.
- Reconciling omnibus trades from the transfer agent with detailed sub-recordkeeping feeds.
- Providing shareholder account level information to track account details, registration and sales transaction by dealer, branch and representative.

With this new transparency and sophisticated sales and asset reporting, Fifth Third was able to save over \$100,000 a year. MARS also dramatically improved communications and the ability to obtain records of all communications and meetings with sales personnel.

At MARS, we are a nimble company of financial experts delivering a superior technical product. We understand your business and have developed our product from the ground up to solely serve your industry. If you believe your company could benefit from additional transparency, call Kathy Walsh at 415-485-4523.