DBSI+CFM

FINANCIAL HEALTHCHECK

WANT TO BETTER CONNECT YOUR PRODUCTS TO CLIENTS' NEEDS?

WE HAVE AN APP FOR THAT.

In-branch transactions are declining – which means fewer face-to-face connections and even less opportunities to uncover what clients really need. How can you drive more people to the branch and make the shift from transactional to advisory? Get answers and boost leads with FINANCIAL HEALTHCHECK.

A digital app available anywhere online, users can quickly self-assess their "financial fitness" through a series of demographic and financial questions scored across three categories.

Users instantly receive a report with their overall financial assessment, suggested recommendations, and the option to request an appointment to review their results with a banking staff member.

These motivated leads are sent directly to your team, primed for your products and services!

LEARN MORE!

Confidential - Patents Pending

Contact us at **info@dbsi-inc.com** | **855-ASK-DBSI** | **www.dbsi-inc.com**

FINANCIAL HEALTHCHECK

WHY DO USERS LOVE IT?

In as little as 90 seconds, users get personalized recommendations on how they can reach their financial goals and see how they compare to their peers locally, nationally, and the top 10%. Even better, they can request to connect with a financial expert, right in the app!

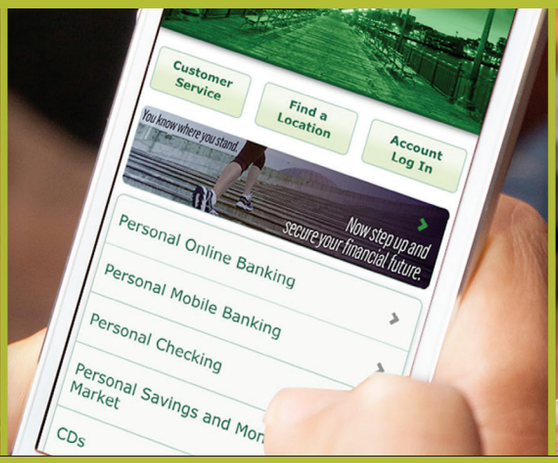
WHY DO BANKERS LOVE IT?

Receive two levels of exceptionally warm leads through real-time appointment requests and financial profiles of users completing the tool. Every submission effortlessly uncovers data-driven snapshots needed to guide advisory conversations, without even asking!

GENERATE LEADS ACROSS ALL CHANNELS

PRINT & STATIC ADS

MOBILE/WEB



IN-BRANCH

DASHBOARDS, DATA, & ANALYTICS DRIVE DEEPER INSIGHTS

FULL FINANCIAL PROFILES OF USERS COMPLETING THE REPORT INCLUDING:

- Contact information
- Financial needs and goals
- Income and debt profile
- Financial obligations of items such as auto loans, mortgage or credit card debt
- Banking accounts held across financial institutions (not just yours!)

INDIVIDUAL BRANCH AND ENTIRE NETWORK REPORTS INCLUDING:

- User demographics such as age, marital status, and gender
- Financial averages for income, debt, savings, retirement funds and more
- Common financial goals and aspirations

Get up and running with **FINANCIAL HEALTHCHECK** quickly—as fast as two weeks! When you are ready to start increasing wallet share, give us a call at 855.ASK.DBSI.

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