

# Remote Account Opening

*for sporting, business and sponsored marketing events*

Leverent's solution allows banks to take new account openings to the customer by having bank associates open accounts on the spot at marketing events and seal the transaction with a signature.

Growing competition for retail banking customers is pushing banks to be more creative in acquiring their clients. Many banks are sponsoring marketing events to accept applications from customers at a variety of field locations including: sporting events, sponsored charity events, community fairs, and business functions. Our solution makes this process more efficient, secure and paperless. The solution is based on Microsoft technologies and includes: handheld scanner, tablet PC, applications customized to your needs, automatic synchronization capabilities and reporting metrics. The solution allows for extensive customizing to meet the needs of each bank's unique strategies for remote account openings.

Onsite Application Capture

**LEVERENT**  
Customer Application Capture

Margie Wallace

[View Applications For Current Event](#)  
[View Applications For All Events](#)  
[Change Current Event](#)  
[Print Applications For Current Event](#)

**Active Event:**

Group Banking Event, San Diego      3/21/2007      3/21/2007

**My Recently Completed Application Forms**

Application Type	Created	Account Name	Event Name
New Customer	3/14/200...	John Doe	Group Banking Event, San Diego
Lead Card	3/14/200...	Mary Jane	Group Banking Event, San Diego
Lead Card	3/13/200...	Henry Ponting	Group Banking Event, San Diego
New Customer	3/13/200...	Mike Holding	
Existing Customer	3/13/200...	Samuel Adams	
Existing Customer	3/8/2007 ...	John Doe	
Lead Card	3/8/2007 ...	John Doe	
Existing Customer	3/8/2007 ...	John Doe	
New Customer	3/8/2007 ...	Paul Rhodes	
Existing Customer	3/7/2007 ...	Mary Jane	

**Selection Application Form**

Select an Event  
Group Banking Event, San Diego

Select an Application Form  
[Lead Card](#)  
[Existing Customer Form](#)  
[New Customer Form](#)

Cancel

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Our solution application is completely paperless, designed to make collecting customer data in the field as simple as possible. The integrated scanner reads business cards or drivers licenses, and pre-fills as much of the application as possible. Once complete, the tablet PC captures the customers signature on the application. We have many forms already available, and can customize the solution to any specific form you may want to add. Once the marketing event is complete, the applications can be uploaded into the proper database for processing. The unique design of the data transfer mechanisms allow fast downloads through multiple types of connections: broadband, dial-up or direct. This solution has been developed with best of breed security and ease of use. In addition to customer capture, there is a rich reporting capability that allows marketing dept managers to make informed decisions regarding each campaigns effectiveness.

**Register for a chance to win.\***  Business Card  Driver License

Name: Varun Dogra

Business Name: Leverent Consulting

Address: 5007 Lincoln Ave., Suite 200

City: Lisle State: IL Zip: 60532

Phone: ( 630 ) 515 3322 Ext: 2255

When is a good time to call?  
Evening

Signature:

Are you a business owner?  Yes  No

\*No purchase, deposit, application or transaction necessary to enter. A purchase will not improve your chances of winning. Void where prohibited. Must be 18 years or older to enter. Official Rules available at event.  
\*\*Credit subject to approval. Credit cards are issued by FIA Card Services, N.A.

**I would be interested in:**

- Business Checking
- Easy Online Payroll™
- Online Business Suite™
- Business Line of Credit™
- Business Credit Cards™
- Business Savings/CDs
- Card Processing Solutions
- Tax and Cash Management Solutions
- Other

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**LEVERENT**

Save

## Driving Results Through Innovation

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