



BOSTON FINANCIAL
DATA SERVICES®

BOSTON FINANCIAL DATA SERVICES - EVENT CENTER

Where business unusual is transformed to business as usual.

EXPERIENCE

At Boston Financial's Event Center, we have been assisting clients with special events for over 16 years. **An event is a process that has a finite start and finish where it would be unrealistic for a client to make an investment in securing additional facilities, hardware, or staffing.** We partner with our customers during their business events to provide supplemental resources to support new products, services, and regulations; alleviating their need for a financial investment in increased staffing and infrastructure.

Partnering with Boston Financial's Event Center is a smart choice. By leaving the planning and execution of your special events to our experienced professionals, you can focus on your clients and core competencies. Our Event Center specializes in delivering various shareholder communications, often requiring a specific call to action. Past events include payments to shareholders for varying reasons (i.e., class action settlement payments received for closed funds), regulatory mailings (i.e., annual reports, privacy, Books and Records), fund marketing campaigns, demutualizations, and IPO's.

FLEXIBLE SERVICE MODEL

Boston Financial's Event Center offers a flexible staffing model uniquely situated to accommodate varying event profiles. Through the primary use of temporary associates, we are able to volume match our staffing to any given event, large or small. This flexible staffing model results in efficient operations and cost savings for you, as it allows for an immediate reduction in staffing if the projected volumes are not forthcoming. Alternatively, should we experience a surge in activity, we can easily and immediately redeploy staffing resources. At Boston Financial, we design a custom plan of action to accommodate your event's unique needs. Our Event Center is proud to offer the following services:

- Project Management/Consultation
- Event Center Systems
- Distribution and Cash Management Services
- Call Center Services – Inbound/Outbound
- Transaction Processing
- Print Mail Services
- Data Entry
- Reporting and Attestations

One of the major services provided by the Event Center is the establishment of a call center to respond to customer inquiries that occur as the result of an event or class action settlement. Our call center representatives are highly trained on specific scripted responses, ensuring every customer obtains consistent, accurate information. The Event Center prevents increased call volumes from impacting your service levels, provides a level of customer service your customers have come to value, and allows your customer service representatives to focus on what they do best.

COMPREHENSIVE SOLUTIONS

At Boston Financial, our Event Center represents an unwavering commitment to the financial services industry. We leverage our experience and that of our parent companies to develop comprehensive solutions. We integrate our proven service model components to achieve a seamless service approach, allowing you to return to what is most important to you - business as usual.

To learn more about the solutions that Boston Financial's Event Center can provide for your unique event please contact:

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