



**BOSTON FINANCIAL**  
DATA SERVICES

# Manage. Customize. Distribute.

## **Control Cost, Expedited Delivery, Tailor Messaging.**

Enhance your client's brand and profitability by personalizing correspondence, literature and documents to individual shareholders and investors. Robust enough to comply with all regulatory and internal requirements, ELEMENTS gives you immediate Web access to everything you need to grow your business and maintain relationships — one client at a time.



### UNLOCK YOUR DISTRIBUTION POTENTIAL

In an industry where rapidly changing investment products and highly competitive distribution channels are the norm, you need cost-effective communication and distribution solutions that can adapt quickly. Our real-time Web-based system, ELEMENTS, is accessible from any desktop, laptop, or mobile device so you can quickly and efficiently find, use, manage, and disseminate the information you need to maintain client relationships:

- Applications and Forms
- Prospectuses
- Summary Prospectuses
- Annual and Semi-annual Reports
- Statements of Additional Information
- Press Releases
- Marketing Brochures
- Fact Sheets
- Presentations
- Performance Updates

We created ELEMENTS exclusively for investment managers and fund sponsors. Developed specifically for mutual fund and alternative investment industries, ELEMENTS meets the unique documentation, distribution, and regulatory requirements of all investment types:

- Mutual Funds
- Closed-end Funds
- Exchange Traded Funds
- Variable Annuities
- Offshore Funds
- Retirement Plans
- REITs
- Hedge Funds
- Separate Accounts
- Institutional Portfolios

**ELEMENTS - A real-time Web-based system, accessible from any desktop, laptop, or mobile device.**

**ELEMENTS** operates in real-time to give you the information you need, when you want it, in the format you want it, and the way you need it delivered. With user-defined interfaces, you control the entire database from user rights and privileges, to content review schedules, approval cycles, and queries. Mitigate business risk and ensure your sales force delivers the best, most compliant information in every situation and interaction with ELEMENTS.

### E-DELIVERY

Forge strong relationships and meet the needs of each individual client by building customized emails and microsites complete with pictures and video clips. Real-time reports and alerts tell you when your materials are opened so you can follow-up with clients.



FIGURE 1 - SAMPLE ELEMENTS LAYOUT

### DIGITAL ASSET MANAGEMENT & FULFILLMENT

ELEMENT's comprehensive library of your documentation and literature operates in real-time and is organized with thumbnail images, PDF file management, fax and email distribution functionality.



FIGURE 2 - KIOSKS NAVIGATION

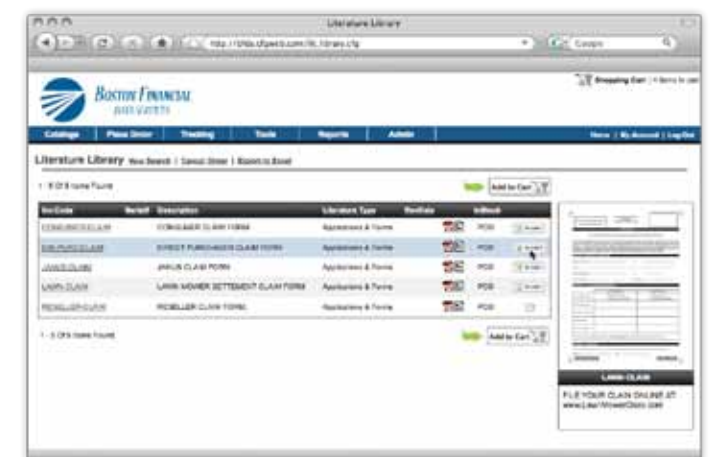


FIGURE 3 - SAMPLE LITLIBRARY



**Capital Fulfillment Group** (CFG) is a marketing and technology solutions company that specializes in the development and implementation of innovative marketing, fulfillment, and compliance automation services. CFG's programs not only capitalize on our experience and focus by exclusively serving the financial services industry, but exemplify a keen understanding of what our clients require from their marketing, compliance and technology partners.

Our customized programs and FINRA approved toolsets are integrated with traditional methods of channel marketing and shareholder fulfillment, enabling clients to more effectively measure, monitor, and manage their own behaviors, make wiser spending decisions, and ultimately reach their primary goal of gaining assets under management.

As with each of CFG's existing financial services clients, Boston Financial Data Services will have access to the latest innovative product management and distribution solutions. Solutions that only a firm with CFG's industry experience and commitment could provide:

- Customized dashboard portals for key accounts and distribution channels
- FINRA-approved toolsets that support traditional methods of channel marketing
- One to one marketing solutions through digital print, download and eDelivery
- Real-time business intelligence for usage, activity and user behavior monitoring

We sincerely appreciate the opportunity and look forward to the prospects of a lengthy and eminently successful business partnership with Boston Financial Data Services

