

Capital Fulfillment Group

# CFGweb

**ONLINE. REALTIME. ONTIME**

100% WEB-BASED. 100% FINANCIAL SERVICES. 100% CUSTOMIZABLE.

Our singular objective is to be the industry's most responsive, efficient and cost-effective partner to support sales and marketing for our clients. In a rapidly changing universe of financial products, highly competitive channels of distribution and new business models, can you afford to have a fulfillment partner that is anything less than highly flexible, proactive and ready to tackle the unique global challenges and opportunities within the financial services industry?



# Accessible by any desktop, laptop or mobile device.

## INCREASE PRODUCTIVITY, BETTER DECISION-MAKING. MORE SALES.

Our Library's easy-to-use interface enables employees to quickly and efficiently find, use, manage and disseminate the information they need, making them more productive and leading to more selling opportunities. Mistakes can be costly and getting the right answers fast is essential to reducing your business risk and maintaining client relationships. Our Library empowers you and your staff to solve problems with ease and continually add value to your business.

## CONTENT MANAGEMENT AT YOUR FINGERTIPS.

The CFG Global Content Library is a comprehensive online resource that stores all of your content – including prospectuses, annual reports, marketing brochures, fund fact sheets, html emails, videos, applications and more.

In fact, the Library can store anything that carries your logo. The Library gives you access to all of your content 24/7 – where you want it, when you want it and in the way you need it. Email new brochures to your sales teams. FTP portfolio manager commentary to your public website. Send an html email directly from your internal sales desk. Or overnight a customized presentation to a prospect. All from the web.

## FIRMS WHO CAN BENEFIT

- Investment Managers
- Broker-Dealers
- Registered Investment Advisors
- Insurance Firms

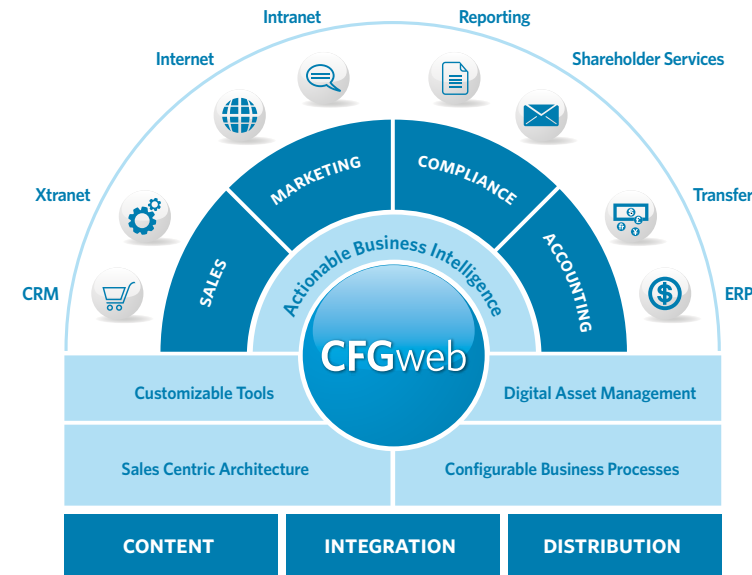
- Banks
- Service Providers
- Retirement Plans
- REITs
- Hedge Funds
- Separate Accounts
- Institutional Portfolios
- Affinity and Memberships Programs

## INVESTMENT PRODUCTS

- Mutual Funds
- Closed-End Funds
- Exchange Traded Funds
- Variable and Fixed Annuities
- Life Insurance
- Property and Casualty
- UITs
- Offshore Funds

## CONTENT TYPES

- Prospectuses
- Summary Prospectuses
- Annual and Semi-Annual Reports
- Statements of Additional Information
- FINRA Letters
- Press Releases
- Marketing Brochures
- Fact Sheets
- Portfolio Manager Commentary
- Pitch Books
- Quarterly and Monthly Performance Updates
- Videos
- Audio
- HTML Email templates



## THE RIGHT TOOLS BUILT BY SEASONED, CHANNEL-SAVVY PROFESSIONALS

Capital Fulfillment Group brings a new paradigm and a new standard of excellence in sophisticated fulfillment solutions exclusively to the mutual fund, investment, and insurance industries.

CFG's customized fulfillment programs offer the most responsive, efficient, and cost effective way to support the literature distribution needs of sales and marketing. Each program features our real-time, online system, CFGWeb, for ordering, tracking, reporting, and managing all fulfillment activities and outcomes

## CFG'S EXPERTISE:

- Supports your sales force
- Achieves your marketing objectives
- Enhances your brand
- Distributes your materials
- Manages your events
- Complies with your standards
- Understands your clients and your distribution channels
- Tracks and analyzes your expenses and usage
- Enhances your profitability
- Respects your processes and systems

**Tap** our unique resources and leverage the latest available technology to consistently meet your clients' expectations.

**Partner** with a team of seasoned, channel-savvy professionals from investment management, insurance, broker-dealers, banks and financial consulting firms.

**Customize** and economize your communications to maximize sales effectiveness



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



**BOSTON, MA | KANSAS CITY, MO | SACRAMENTO, CA**

[www.cfgweb.com](http://www.cfgweb.com)



BRO-CORE-CW