

# Build profitable primary banking relationships with ClickSWITCH

Acquiring new account holders is tough, time-consuming, and expensive. Then, after onboarding, only about 50% of newly opened checking accounts survive past 90 days—and a lot of the remaining half are inactive, costing you money. Financial service providers need to increase deposits and engagement early in the banking relationship and avoid costly churn.

**ClickSWITCH** helps transform new and existing accounts into primary banking relationships. We automate the process for switching direct deposits and recurring payments to your organization, making it quick and easy to complete. It's simple, saves your account holders time and hassle, and helps you **grow deposits, revenue, and overall engagement**.

**A convenient way to migrate direct deposits and recurring transactions**

For end users, the switching process takes as little as ten minutes.

**It's as simple as:**

**1** Access ClickSWITCH



**2** Search for an employer



**3** Submit the switch.



When the switch is complete, **ClickSWITCH** can even initiate the closure of the legacy account, consolidating the user's finances and ensuring that you're their primary banking relationship.



Only about

**50%**

of newly opened checking accounts survive past 90 days

Proper onboarding practices can help boost account profitability by

**\$200+**

per year



## A quick, complete process for account switching

With a simple but feature-rich user experience, **ClickSWITCH** ensures that nothing slips through the cracks when onboarding or re-engaging your account holders:

- **ClickSWITCH** integrates with online banking, account opening, and branch software via APIs or SSO
- It's easy to set up and provides an admin portal to help you track all **ClickSWITCH** activity and create reports.
- Auto-population helps account holders speed through the process and avoid errors.
- Switch Status gives account holders a detailed view of all switches in progress.
- Fast implementation, including available training, makes it possible to get your account holders up and switching in as little as 30 days.
- Customizable marketing tools and content help you promote **ClickSWITCH** to new and existing account holders.
- **ClickSWITCH** can be used as a white label product—or you can build against our APIs to create your own experience account switching.
- It's really as quick and easy as clicking on a payee or biller. **ClickSWITCH** takes care of the rest.

### **ClickSWITCH's benefits**

#### **For financial institutions**

- Increase direct deposits
- Gain more primary account holders
- Re-engage with inactive accounts
- Increase onboarding efficiency

#### **For account holders**

- A digital, paper-free process
- A fast, hassle-free experience
- Simple consolidation of financial accounts
- Closure of legacy accounts

To learn more or schedule a demo, visit [ClickSWITCH.com](https://ClickSWITCH.com).