

# Highlights

- Accontholder outreach and financial education program
- Helps you address excessive usage
- Provides tools for outreach & communication with your accountholders
- Online tutorial in checking account management customized for your institution
- Provides financial education and information on overdraft alternatives available at your financial institution
- Comprehensive, turnkey solution



Powered by **Pinnacle**

## FINANCIAL EDUCATION SOLUTION

Guidance applying to all FDIC-regulated financial institutions that went into effect July 1, 2011, impacts the ways in which you communicate with accountholders who use your overdraft privilege services. Pinnacle's turnkey solution helps institutions meet these guidelines and, equally important, helps ensure that consumers receive a consistent and accurate message.

### Our Financial Education Solution includes:

- A 45-minute online tutorial on checking account management titled "Checking Navigator," branded with your logo and customized to feature your products and services
- Hosting of your customized program
- Complete tracking and reporting capability
- Hard copy version of the online course
- Customer outreach guide
- "Excessive user" communication template

### Tracking and Reporting Capabilities:

- Log-in and password access database is completely secure and confidential.
- Your accountholder's name, address and email address are captured in the database and can be exported to desktop applications.
- Activity, including completion of program, is tracked and maintained in the database.
- System can notify designated person(s) each time an accountholder logs on and/or completes the course.



Checking Navigator is an interactive and educational online course in checking account management that you can easily offer to your accountholders.

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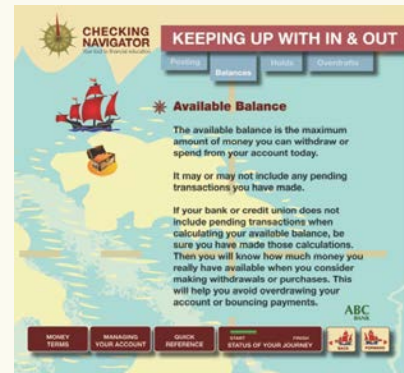
# CHECKING NAVIGATOR



Checking Navigator is divided into two sections covering definitions of money terms and practical guidance about managing a checking account.



As your accountholders “navigate” their way around the island, they gain important information and insights.



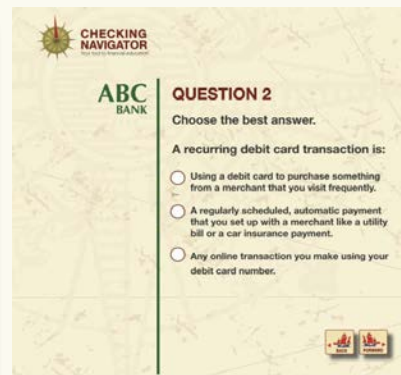
The “course” guides your accountholders through critical terms and transaction processes that can have dramatic impact on their account.



The Checking Navigator was designed especially to address “excessive users,” so a great deal of attention is paid to understanding how overdrafts occur and what protections are available.



Customized “seed” slides throughout the course give you the opportunity to showcase your institution’s relevant products and services.



An interactive quiz at the end of each section reinforces key messages, and accountholders can print out a certificate of completion. It’s up to you to decide whether and how to reward them for their effort.



Pinnacle Financial Strategies provides customizable performance measurement programs, overdraft privilege services, streamlined account opening, debit card program optimization, cash back rewards programs and business banking solutions to help institutions gain a competitive edge, attract and retain accountholders, and improve profitability.

Demo It Now. Log on at [pinnstrat.com](http://pinnstrat.com).

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