

# Financial Services

The Power of Team + Innovation = **Synovation**

Synergy Solutions has vast experience servicing and marketing financial services products for some of the nation's largest financial organizations and has demonstrated success in all areas of financial services marketing.

Headquartered in Phoenix, Arizona, Synergy specializes in "high-end, high-touch" programs in which the customer experience is essential to success. We are committed to providing our clients with solutions to increase sales, decrease attrition, enhance customer delight and drive consumer loyalty.

Utilizing flexible technology to enable speed to market in a dynamic environment, we partner with leading companies across a variety of industries to provide efficient, value-added solutions that lower costs and elevate the customer experience. Synergy offers the expertise, pricing and technical/analytical resources of a large corporation, while maintaining the innovation and agility typically found only in small, boutique companies.

Synergy Solutions was founded by a team of industry veterans, each with an average of 20+ years of industry experience and proven results driving solutions at all levels of the organization. This expertise is enterprise-wide and extends to every corner of the company.

Our Mission is based on the concept of "Synovation," which can be defined as combining synergy and innovation. Our commitment to continuous improvement and our continual focus on systems, processes and people enable Synergy to lead our clients and employees into the next generation of customer contact solutions.

Our Vision is to bring together the best people in the industry to provide superior service and valuable expertise, which propels our client partners to exceed their strategic goals in the financial services industry.

## Service Options

Synergy Solutions offers a wide array of customer interaction solutions across the channel of preference for your customer inclusive of inbound and outbound phone, email, chat, IVR and social media. Our vast experience in all aspects of contact center management allows us to provide scalable, quality, cost-effective solutions for our prestigious client base.

Synergy prides itself on its high customer retention, which is earned through our commitment to customer delight.

Synergy offers both dedicated and shared staffing models in English and Spanish, 24/7/365.

## Service Centers

Synergy's contact centers and secure, redundant data center are all strategically located in the United States.



## Financial Solutions:

### Credit Monitoring/Fraud Prevention

- Sales & Enrollment Processing
- Inbound Customer Service
- Retention
- VIP Customer Segments

### Debt Deferment & Debt Cancellation

- Sales & Enrollment
- Customer Service
- Retention
- Call to Activate

### Credit Card & Retail Banking

- Approved Vendor Status
- Acquisition & Retention
- Card Activation
- Fee Based Products
- Membership Product Sales
- Card Insurance Products

### Other Financial Services

- Debt and Bankruptcy Counseling
- Student Loans
- Business Lines of Credit
- Auto Loans
- Investment Services
- Tax Counseling Services
- Home Equity and Mortgage
- Products Medical Savings Accounts

### Compliance & Risk Mitigation

- PCI Compliant
- Adherence to CFBP defined best practices
- PACE SRO Accreditation: TCPA, TSR, State Regs

## For More Information:

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