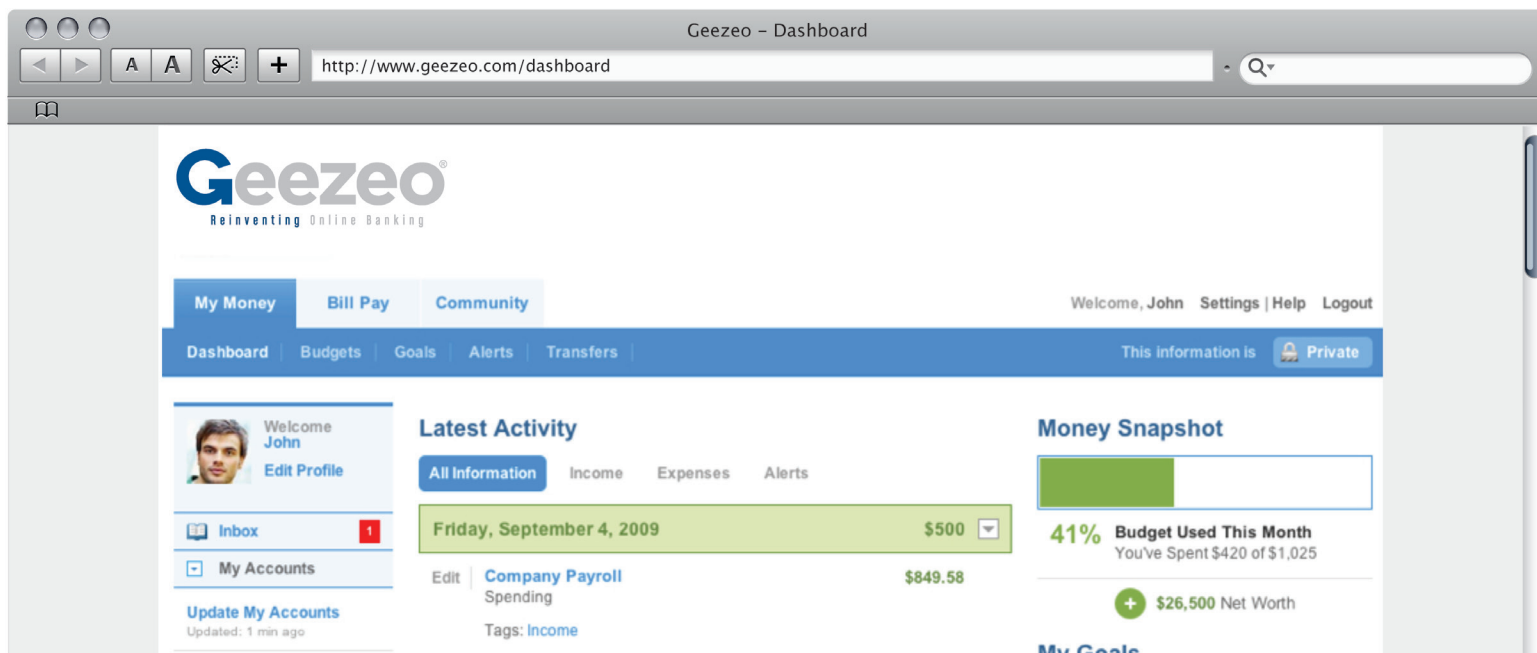


White Label PFM

Drive growth, ROI, and satisfaction



Target communications to specific members of your online community

Geezeo offers an integrated suite of online Personal Finance Management (PFM) tools and services. PFM empowers your online members, giving them a holistic view of their finances.

Increase share of wallet

With account aggregation, members' accounts held outside your institution can be viewed and leveraged. The Integrated Marketing Platform considers users' financial profiles, aggregated data and habits to help you present the most relevant solution.

Expand your market

Your members will appreciate the convenience of managing all their banking relationships in a one-stop environment. Geezeo helps you take the chore out of banking, while delivering the on-demand tools your market requires.

Increase retention and satisfaction

Giving your members access to PFM tools such as budgeting, goal management and cash flow provides instant benefits few other financial institutions can provide. Geezeo supports your brand by positioning you as an enabler and advocate.

Specific Features

Our Personal Finance Management software provides a robust set of out-of-the-box solutions for your financial institution.

- Budgeting
- Account Aggregation
- Alerts
- Categorization Tagging
- Split Tagging
- Cash Flow
- Bill/Income Calendar
- Net Worth Calculator
- Goal Management & Tracking
- Expense Tracker

To learn more about Geezeo's White Label PFM contact Steven Nigri:

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