

**Geezeo<sup>®</sup>**

Enriching Digital Banking

# Marketing Strategy to Promote Your PFM

A Case Study Example: F&M Bank



When F&M Bank prepared to launch its new Geezeo digital financial management platform, here are some of the

**marketing strategy**

**best practices**

they put in place, that we'd recommend for any client.



**F&M Bank**



WHO

\$750 million in assets

Founded in 1908

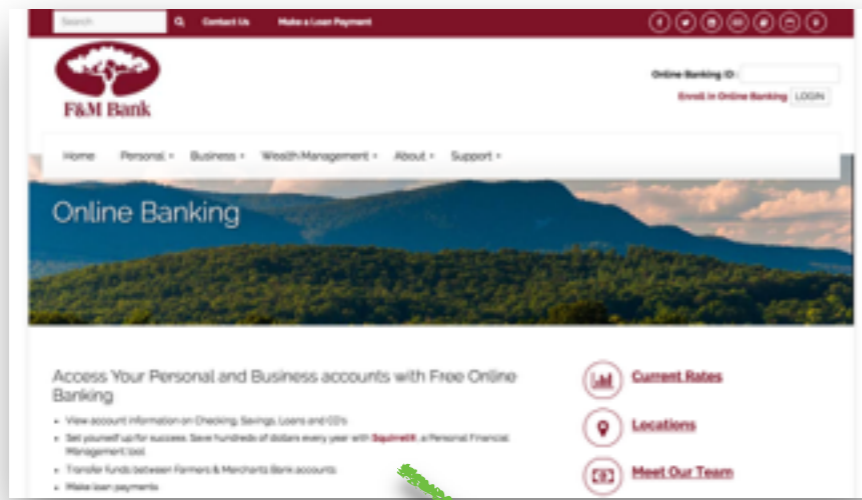
175 employees in 4 counties

Publicly traded

# Branding

clever brand that connects with FI's overall brand





# Setting up a landing page

an educational hub for customers and staff, F&M Bank used one of Geezeo's custom landing page templates for easy setup



# Sponsoring a Facebook post

**F&M Bank**  
Sponsored

Create a budget, organize your personal finances, save for vacations and retirement, or manage your small business spending with this list of top finance apps!

**Squirrel**  
Your Personal Finance Management Tool

Monday, January 23, 2017

Transaction	Category	Amount
Venue	Utilities	-\$10.99
Check #125	General	-\$200.00
Starbucks	Coffee	-\$6.83
GameStop	Entertainment	-\$5.99
Dave's Auto Repair	Transportation	-\$262.47

Sunday, January 22, 2017

Check #125	Transportation	-\$25.99
------------	----------------	----------

**Total Budget** \$1,238/\$1,075

- Clothing \$89/\$100
- Transportation \$207/\$400
- Household \$1,219/\$2,000

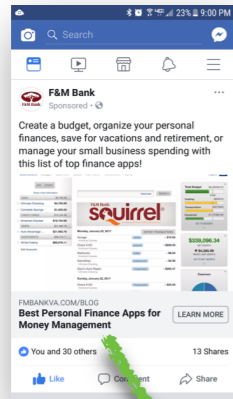
**NET WORTH**  
\$339,096.34  
+\$4,285.99 SINCE LAST MONTH

**Expenses**

FMBANKVA.COM/BLOG  
**Best Personal Finance Apps for Money Management** [LEARN MORE](#)

You and 30 others 13 Shares

Like Comment Share



linked from sponsored Facebook post

### Best Personal Finance Apps

2 out of 3 Americans prefer to bank digitally

From credit cards to bank and retirement accounts, our financial lives are complicated. Understanding what you have and how to make it work for you is critical. Whether you're trying to improve your credit score before making your first home purchase, or you want to save for a vacation or big purchase, these apps can help you take those specific steps as well as basic ones like creating a budget.

# Writing a blog post

### Know Your Credit Score

As your credit score is the backbone of your financial life, consider downloading **Credit Karma**. It gives you a free copy of your credit report as well as advice on steps you can take to get your score where you want it to be. In this age of online security threats, Credit Karma also provides you with notifications to alert you to new activity reflected on your report.

### Banking Apps

Your bank account is at the heart of all you do, from paying bills to buying lunch on the go. A sound banking app, such as **F&M Bank's Mobile Banking app** will make you the master of your domain from the convenience of your phone or tablet. Your account is kept safe via passcode or touch ID entry to the app, where you can view transactions, pay bills, deposit checks through mobile deposit, and transfer funds between F&M bank accounts. Using the F&M mobile app will not save any sensitive information to your phone.

### Budgeting Apps

While on-the-go access to your accounts is essential, creating objectives for your money is just as critical. **Squirrel** is F&M Bank's no-cost Personal Financial Management Tool and it enables you to track your spending, create budgets, and set goals. While you'll need an F&M Bank online account to use Squirrel, you can link your Squirrel account to other accounts you have such as a 401(k) or other retirement account. With access to 15,000 financial institutions, Squirrel provides you with a full financial picture, including a cash flow calendar and visual tracking of progress to your goals.

With a complete financial picture, including your total net worth after debts and assets are combined, Squirrel offers the same information as the mobile banking app as well as so much more. Don't just watch your money go in and out on your account ledger. Take control and set goals for saving and debt repayment, check cash flow before making discretionary purchases, and feel empowered to take the steering wheel of your financial life.

### Best Apps for Business Owners

Companies with a business checking account can also use their bank's mobile app to keep track of daily transactions and cash flow.

Beyond you're a business banking app, **inDinero** is a tax compliance and accounting app that compiles information from all of your business bank accounts and credit cards to present a clear, comprehensive view of your company's spending. Discover where your money goes and when, and obtain forecasts of future spending based on current trends. inDinero allows you to gain insight into the total picture of your business' finances. Plans start at \$295/month.



# Tying in branding

Upcoming Events



**FAMILY FUN DAYS**  F&M Bank

Apr 14 **F&M Bank Family Fun Day in Millboro**  
Sat 11 AM · MPCA-Millboro Preservation and Cultural A...  
You like F&M Bank [★ Interested](#)

 **F&M Bank** added 4 new photos. January 23 · 🌐

In case you missed it, National Squirrel Appreciation Day was on January 21st, and Sammy has completely flooded our branches with squirrel memorabilia. Keep an eye out - you never know which branch Sammy might show up at! 🐿️



🤩 Wow    💬 Comment    ➦ Share

👤 You, Holly Thorne and 15 others

# Using Geezeo's quarterly turn-key marketing campaigns

social posts



website ads

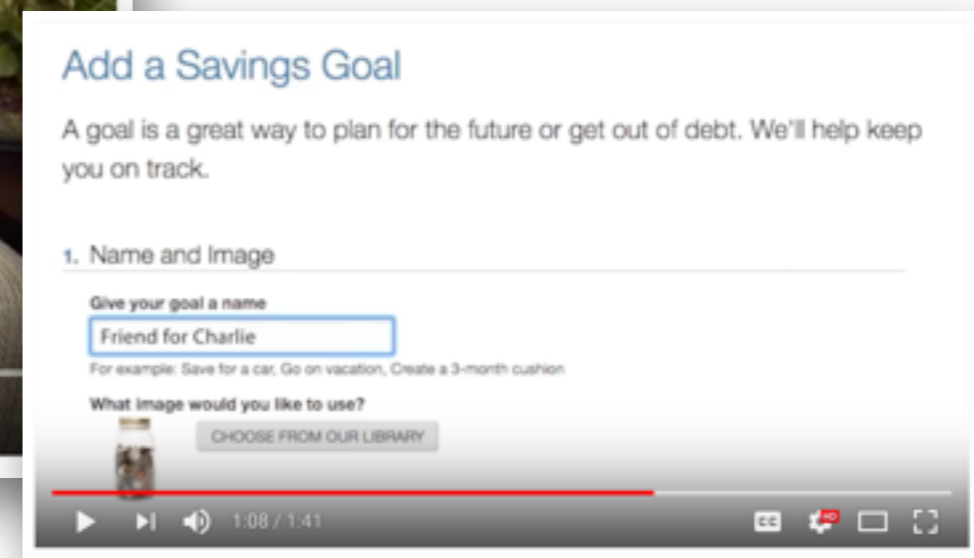
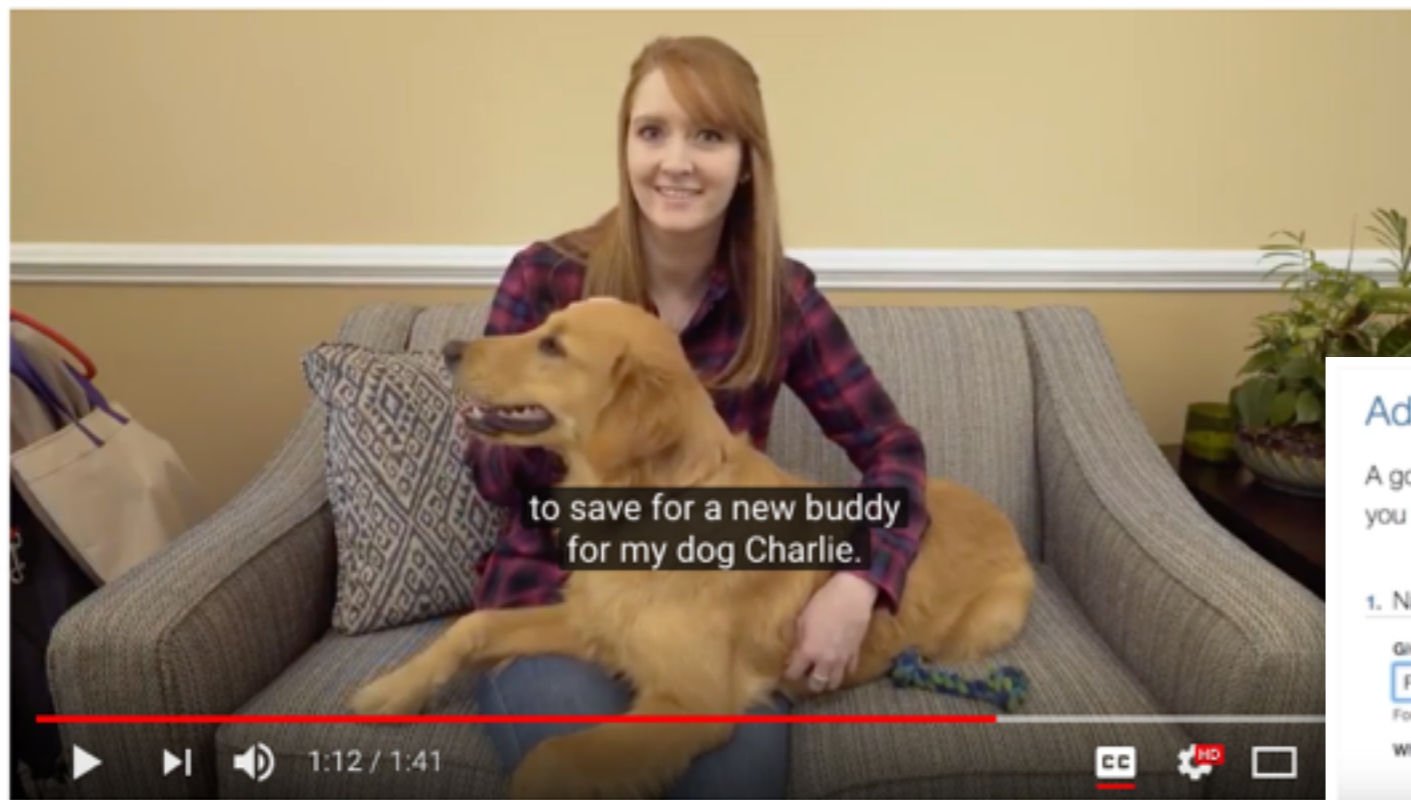


in branch  
counter  
take-ones



# Telling story with video

“how we can help you”



# Working with Geezeo



**Trae Turner**, Geezeo Marketing Director and **Holly Thorne**, F&M Bank Marketing Director, brainstorming some best practices for promoting digital financial management

**“Geezeo provides excellent customizable marketing materials and quarterly campaigns, so we’re pleased to have that extra boost to our in-house efforts.”**

— F&M Bank Executive Vice President, Chief Retail Officer  
Stephanie Shillingburg



## Adoption Marketing

- social
- emails
- lobby monitor
- website ads
- landing page
- video
- Geezeo's quarterly turn-key campaigns

**promote**  
your PFM



**give them**  
what they  
**need**



- Targeted, personalized outreach
- better loan rates
  - vehicle loans
  - HELOC
  - wealth management
  - credit cards
  - fraud alerts

*Adoption Marketing & PFM Data*

**customers**  
tell you  
who they are

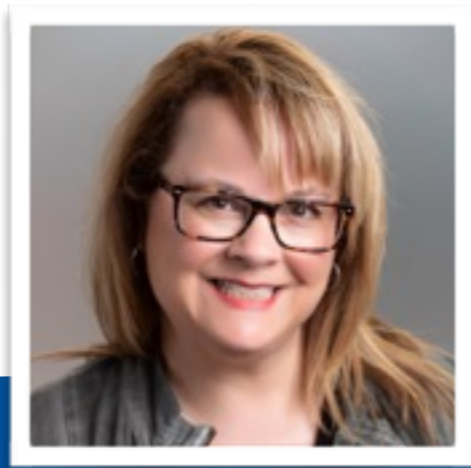


- In PFM,
- synced accounts from other FIs
  - tagged transactions
  - net worth assets and debts
  - budget categories
  - short and long-term savings goals

**listen**  
to them



- View in PFM Admin
- accounts, loans, credit cards, mortgages at other FIs
  - savings goals
  - cash flow issues



To learn more do not hesitate to contact:

**Trae Turner**

Marketing Director

[tturner@geezeo.com](mailto:tturner@geezeo.com)