



Intermountain Financial Institutional Services

**HELPING CREDIT UNIONS
WIN IN TODAY'S
COMPETITIVE CLIMATE**

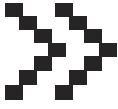
Intermountain Financial Institutional Services is in the business of helping others. In an industry where building member loyalty is the key to survival, Intermountain partners with a growing number of credit unions to provide a complete financial services platform for insurance and investment products. Using SmartOffice Online[®] from E-Z Data, Intermountain brands and manages the entire sales process for each of its clients, beginning with the building of a sales culture within each organization, and then supporting the business with on-site financial advisors that ensure the highest possible customer service. For the credit unions, this adds up to higher deposits and greater loyalty. For Intermountain, it equates to fast-growing revenues and an expanding business.

Prior to selecting SmartOffice Online, Intermountain went through two other contact management systems in an effort to address their business needs. The problem: neither solution was built to meet the very unique needs of financial services organizations. "One of our biggest challenges is managing the account effectively after the sale is closed," says Todd Kim, President, Intermountain Financial Institutional Services. "We need to know: Is the paperwork completed? Who in the back office is accountable for finishing the deal? Nothing we've found is as complete as SmartOffice at providing this visibility. E-Z Data has a much more thorough understanding of the financial services workflow, which makes it much easier to drive these processes."

"Ultimately, SmartOffice Online is a cost effective and easy way for our advisors to stay on top of it all and to get more chances at bat, and the more they get at bat, the more they're going to hit home."

Todd Kim
President
Intermountain Financial
Institutional Services





SmartOffice Online is used by every Intermountain advisor located at each client site. Not only do the advisors use SmartOffice to track and manage their own client activity, but all of the information they enter into the system is then available online to Intermountain management. Intermountain uses this data to deliver weekly reports for every one of its credit union clients. These reports highlight the success rates of the program, identify and address areas that require improvement, and illustrate the resulting increases in account aggregation and deposits to the institution. Intermountain also uses SmartOffice internally to plan, market, and manage financial services seminars for its clients.

Although E-Z Data solutions are available both networked and online, Intermountain selected the online version of SmartOffice for a number of reasons. First, Intermountain determined that SmartOffice Online provides a higher level of security than they could provide on their own for anything less than \$100K. From a privacy perspective, the online system protects all client data, even if an individual advisor leaves the organization. And lastly, SmartOffice Online offered superior ease of use — including portability, hassle-free system maintenance, and online training — and a price tag that made outsourcing the system an obvious choice.

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About Intermountain Financial Institutional Services

Intermountain Financial Institutional Services is a full service financial advisory firm specializing in the unique financial platform needs of banks and credit unions. Intermountain positions itself as the institution’s full provider for on-site financial representation while branding and promoting the institution they serve. Intermountain’s transparent and comprehensive accountability and management programs allow for flexibility for each institution and control over their particular program. Intermountain currently serves multiple institutions throughout the western states.

About E-Z Data, Inc.

E-Z Data, Inc., established in 1986 is the leading provider of front-office systems for insurance companies, broker-dealers, banks, credit unions, general agents, agents and investment advisors. Its web-based SmartOffice® solutions and Windows®-based Client Data System® solution help synchronize the efforts of all the key players in sales, marketing, and customer service.

For more information about E-Z Data’s solutions, visit www.smartofficeonline.com or call 800-777-9188.

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THE ONE CARD SYSTEM

Driving the activity that delivers productivity

To gain even greater benefits from SmartOffice, Intermountain chose the One Card System Edition — an electronic version of the well known industry standard that helps agents and advisors better manage client activity to drive up success rates.

The solution tracks daily activity and sends automated alerts to help each advisor make certain they follow through on every task. “The One Card System doesn’t let anything fall through the cracks,” says Kim. “That level of detailed activity tracking is key, because production always follows activity.”

SmartOffice — One Card System Edition has already helped Intermountain to:

- Increase activity by 40%
- Boost productivity by 25%

“Our advisors — from those with just two to three years experience to 20-year veterans — love the success they’re achieving using the One Card System Edition.”