

D S T O u t p u t C u s t o m e r S u c c e s s S t o r y



Investors Bank & Trust Company Takes Full Advantage of DST Output's Total Solution

THE BUSINESS CHALLENGE

The trust banking industry views statements as consistent ambassadors of the firm's products and services. They're tangible items that the client can hold in their hands to provide proof of services rendered.

A leading trust banking institution, Investors Bank & Trust Company (Investors Bank), recently decided their statements should do more. They felt that their statements, both printed and electronic, could differentiate their services from those of their competition.

With over \$1 trillion in assets under administration, Investors Bank provides customized securities processing services for individual and pooled financial products both domestically and globally. They take pride in offering unparalleled accuracy and timeliness of information, coupled with an extraordinary dedication to client service. In fact, Investors Bank was recently recognized for their client service excellence, winning Best Global Custodian in *Global Investor* magazine's 2003 Global Custody Survey. In addition, Investors Bank was rated the #1 Global Custodian overall in *Global Custodian* magazine's 2003 Custody Survey.

They wanted to align their brand promise — superior account and customer service — with the look and feel of their statement. They needed their statement to be a sales tool for advisors to sell their advisory services through the promise of high quality design and best in class information. They also wanted the statement to be customizable with modern options to meet client needs, such as advisor logos, statement format options, and personalized messaging. Finally, Investors Bank also wanted the new statement design to be cost efficient to produce.

THE SOLUTION

Investors Bank turned to DST Output for assistance with this project. They knew DST Output's industry reputation for information design and production excellence would serve them well. In addition, DST Output offered online statement presentment and other services to take Investors Bank's dated process into an automated and efficient delivery routine.

DST Output and Investors Bank set out on a collaborative effort to create a new financial statement to meet the Bank's business needs. DST Output's integrated print and electronic channel process provided more statement presentment options to the Bank's clients, while realizing cost savings over the old production process.

Together they were able to design a statement in print, and electronically over the Internet, that was easy to read and understand, and enabled clients to find key information quickly and select what they would like to see on their statement. Statement messaging is customizable, and allows personalized messages from trust advisors to their trustees for relationship building and cross-selling opportunities.

Investors Bank also chose to implement short- and long-term viewing tools, and SEC-compliant archival solutions to further improve their back-office operations.

Bruce Mailberg, Director of Institutional Custody Operations, Investors Bank, states, "Working in a truly collaborative effort with DST Output's statement design experts, Investors Bank was able to produce a high quality professional statement at a lower cost while providing our clients with superior service. In fact, we are on track to exceed our goal of \$360,000 in estimated annual savings. DST Output was the right team to work with us to make this happen and we're thrilled with the results."

The collaborative partnership continues between Investors Bank and DST Output. The Bank next plans to automate additional lines of business, print checks, provide tax reporting, and enhance management reporting using DST Output services.

ABOUT DST OUTPUT

DST Output is a leading provider of integrated print and electronic customer communications solutions. We create customer communications that strengthen the relationship between our clients and their customers. By integrating advanced customer relationship management techniques, we help the world's leading businesses create lasting, profitable relationships with their customers.

ADDITIONAL INFORMATION

To learn more about how DST Output can help you build profitable relationships with your customers, call 800.441.7587 or visit our Web site at www.dstoutput.com.



making customer connections count