

# Consolidated Statements

## Client Opportunity

Lower postage costs for delivering relevant account information, value-added services and promotions.

## Our Solution

A consolidated statement containing promotional platforms and cross-sell opportunities.

Consolidated statements allow clients to save on production and postage costs by cutting down the number of mailings needed. Using variable data to target messaging increases visibility and improves response rates.

## Cathedral Advantage

- Multi-Page Simplex or Duplex Printing
- Variable Messaging and Photo Options
- Consolidated Statement Layout
- Highlight or Full Color Options
- 100% Quality Guarantee
- Inline Digital Inserts and Banner Ads

### Customized Cross-Sell Offers!

The image displays three overlapping sample pages of a consolidated financial statement. The top page is a 'Portfolio Statement' for a client named Christopher Scott, dated July 1, 2003, to September 30, 2003. It includes a 'Portfolio Summary' table with columns for Plan Name, Plan Number, Value Last Statement, Value This Statement, Dollar, Change in Value, and Percent. Below this is a 'Historical Information' section with a bar chart showing cash invested to date. The middle page is a 'Social Bulletin Board' featuring promotional offers for 'Wine Vacation' and 'European Castle Tour'. The bottom page is another 'Portfolio Statement' for the same client, showing 'Retirement Savings - Activity' and 'Investment Plan' details, including a 'Plan Allocation' pie chart and a table of investments.

Full color, personalized account information!



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