

# BOSTON FINANCIAL'S Event Center

*Where Business Unusual is Transformed  
to Business as Usual*



## EXPERIENCE

Boston Financial's Event Center has been assisting clients with special events for over 20 years. We partner with clients to rapidly respond with expert support for critical and time sensitive events, compliance and regulatory communications, distributions, class action settlements, and service concerns; alleviating the client's dependence on internal resources.

By leaving the planning and execution of your special events to our experienced professionals, you can focus on your clients and core competencies. Our Event Center specializes in delivering various communications, often requiring a specific call to action and expert response management.

## CUSTOM SERVICE SOLUTION

Boston Financial's Event Center offers a flexible staffing model uniquely situated to accommodate varying event profiles. We are able to quickly volume match our staffing to any event, large or small. This results in efficient operations and cost savings to our client. We design a custom plan of action to accommodate your event's unique needs. Services include:

- Project Management/Consultation
- Event Center Systems and Web Solutions
- Distribution and Cash Management Services
- Call Center Services - Inbound/Outbound
- Transaction Processing
- Print Mail Services
- Data Entry
- Reporting and Attestations

Customer care service is one of the major services provided by the Event Center. Our customer care representatives are highly trained ensuring every client obtains consistent, accurate information. The Event Center prevents increased call volumes from impacting your service levels, provides a level of customer service your clients have come to value, and allows your customer service representatives to focus on what they do best.

## COMPREHENSIVE SOLUTIONS

At Boston Financial, our Event Center represents an unwavering commitment to the financial services industry. We leverage our experience and that of our parent companies (DST Systems, Inc. and State Street Corporation) to develop comprehensive solutions, allowing you to return to what is most important to you - business as usual.



**BOSTON FINANCIAL**  
DATA SERVICES®

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# Successfully Managing Complex Events Across the Financial Services Industry

## Insurance

- Regulatory and Class Action Settlement Administration Services
- Unclaimed Property and Escheatment
- Demutualization Support
- Administrative System Upgrades and Migrations
- Return Mail Address Changes
- Beneficiary Validations
- High Volume Processing and Call Support
- Back End Scanning

## Mutual Fund

- Regulatory and Class Action Settlement Administration Services
- Payment Distribution
- Inbound/Outbound Call Campaigns and Outreach to Reinforce Calls to Action
- Regulatory Mailings and Processing
- State Inactivity – Notification and Response Management
- Low Balance – Notification and Response Management
- Fund Liquidation – Notification and Exchange Program
- Back End Scanning

## Corporate Actions

- Paying Agent Services
- Tender Offers
- Pension Termination and Modification
- Rights Offering, Subscriptions

Annually, Boston  
Financial handles:

Over 2M calls



3.5M pieces of mail



21M images



11M transactions



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