



# 3 Ways

**To become a strategic partner  
for your banking clients.**



1

Expand your strategic  
advisor services.



2

Engage with new small  
business customers.



3

Add lifetime value to your small  
business clients.

## Why offer more than just standard "banking" products for your customers?

Let's face it, the bank is a small business owners  
strongest ally.

As one of the earliest partnerships on the road to  
success, your bank has a unique opportunity to  
foster long lasting relationships as a strategic  
advisor for small business owners.

As a **strategic advisor**, you understand your role  
as a knowledgeable and trusted resource for small  
business owners.

You also understand that every small business is  
unique, and that their success is your business.

Learn how Deluxe's Incorporation Services help  
position your bank as strategic advisor who can  
help clients open the accounts necessary for small  
business success.



“Your customers need help with business registration filings. They look to their banks to provide them with guidance and assistance.”

## 1 Expand Your Strategic Advisor Services

Your customers want to open a bank account for their business. However, they may not have their tax ID, or they may not have completed the necessary corporation or LLC formation paperwork.

Deluxe's Incorporation Services allow banks to provide customers with these services without any additional workload.

Our team of filing experts handle the process from start to finish, completing the required paperwork on behalf of the customer, allowing clients to seamlessly open business accounts while avoiding common hurdles and pitfalls.

An EIN also allows businesses to hire employees and build business credit. That's a win for the customer, and a win for the bank.



## 2 Expand Your Strategic Advisor Services

As a strategic advisor, you have a fantastic opportunity to educate business customers about what it means to incorporate a business. It's equally as important that clients understand the risks that come with being an unincorporated business.

These risks may create long-term issues which may have negative impacts on the company:

- Putting personal assets at risk.
- Difficulty establishing a strong brand reputation.
- Inability to open a business bank account.

Establishing a dialogue with business owners about the risks of operating an unincorporated business presents a valuable opportunity to educate clients about the importance of incorporation.





### 3 Add lifetime value to your business clients

Deluxe's incorporation services go beyond helping your customers meet their business' banking requirements. The services offered provide value throughout the entire life cycle of a small business.

Help customers file a DBA and obtain locally required business licenses.

Provide resources for annual/biannual maintenance filings.

File trademark and copyright applications

Close a business by filing a dissolution

Clients can continue to look to you well after their business has opened its doors. Over time, this adds lifetime value to their businesses earns your bank a reputation as a trusted strategic business advisor.



## Get In Touch With Us

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Deluxe's Incorporation Services helps you quickly onboard new small business banking customers without hassle. Create a long-term relationship between you and your customers, all while helping them start and manage a successful, long lasting business.