

Truebridge Appoints Casey Roberts National Sales Manager

**Senior executive will provide solutions
to a financial services industry that is
searching for new sources of revenue**

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Boston Mass. (January 11, 2012). Truebridge, Inc. (www.truebridge.com), a leader in marketing for the financial services industry, announces the appointment of Casey Roberts as EVP of National Sales. Truebridge provides innovative marketing services to help financial institutions increase revenue through more effective cross selling.

This addition is a major step in fulfilling the Truebridge goal of adding more value through a consultative approach. Roberts will lead the way in offering marketing solutions that align with client goals and are implemented in a way that show results.

“Casey is well positioned to get under the hood and really understand the issues and also help see and capitalize on the opportunities,” says Stewart Rose, President of Truebridge. “He has had a tremendous amount of experience and success in generating cross sell revenue, having run the investment program at Sovereign Bank where he grew their program tenfold in 10 years. He knows what goes on in the branches and he understands the challenges to cross selling.”

“This has never been more important than it is today,” according to Roberts. “With the new regulations in place and margins squeezed by the low interest rate environment, financial institutions need to generate more sales without adding associated cost. They have made a big investment in their branch network and now they need to leverage it for more than deposit gathering. At the same time, many traditional lead generating techniques are worn out. A new approach is needed to engage customers.”

As a former client of Truebridge, Roberts is very familiar with the set of marketing solutions he will provide. Truebridge has created an educational approach to cross selling that leverages existing communication channels (branches, website, email, and social media) to deliver educational content in a way that generates sales leads. “It’s a turnkey marketing system that helps institutions realize the enormous opportunity they have to leverage frequent contact into stronger and more profitable relationships,” says Roberts.

In addition to Sovereign Bank, Robert’s previous experience includes Bank of Boston and Fidelity Investments. He is a graduate of Boston College and lives with his wife and two children in the Boston area.

About Truebridge

Boston-based Truebridge, Inc. works with financial institutions across the U.S. to help them more effectively acquire, retain and cross sell. Truebridge offers an all-in-one, education-based marketing system that helps drive sales from the branches, the website, and through social media. More information is available at www.truebridge.com.