

TBAS Strategic Marketing Solutions

Marketing and Lead Generation Support



“Globalization, increased regulations, product commoditization, and decreasing margins are just a few of the challenges facing the Financial Services industry. Meeting these challenges will lead to transformations and innovative business models as the industry implements new technology and operational practices, alternative service models, and more comprehensive risk management and compliance frameworks.”
Joseph Rossi, Principal, TBAS

Meeting your toughest business challenges requires a senior advisory team with long standing industry experience. TBAS has *proprietary* marketing research, methodologies, analytical tools and industry access that will help you achieve profitability and growth, along with a deep understanding of the U.S. Financial Services industry’s landscape.

TurtleBay Advisory Services operates at the intersection of client expectations for real transformation with optimal advisory and strategic marketing solutions and support.

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As a B2B marketing, research and information hub serving the global banking, insurance, and capital markets industry, TBAS is at the forefront of helping organizations achieve marketing success, operational efficiency, comply with regulatory requirements, and return to profitability.

TBAS has created a marketing team and advisory engine, **FSO Knowledge Exchange** (a wholly owned entity of TBAS), through which we can provide our clients with market intelligence and access. FSOkx delivers in-depth coverage and analysis based on original and secondary sourced research. We bring these actionable insights to Financial Services executives through various communication channels and services, providing our clients with a complete platform to connect directly with a highly qualified audience of financial industry decision-makers.

Our suite of services includes:

Research & Analytical Tools: informative industry research is customized and developed on a client-by-client basis. FSOkx provides our clients the ability to design market research surveys on topics such as Technology and Operations insights, BPO and IT spending forecasts, and industry vertical-specific trends aided with decision-supported statistics such as economic measurements.

FSOkx Events: providing executives with thought-provoking insight on various topics and networking opportunities with the who’s who of the Financial Services industry. These events include: breakfast briefings, conferences and webinars targeting c-level executives in banking, insurance, asset management and asset servicing industries.

Education Programs: one to two-day offering of course curriculums given by Subject Matter Experts on specific timely topics. These courses are available as customized, in-house training options in areas such as Risk, Liquidity Management, CCAR reporting, etc.

Marketing Support for Product Launch Campaigns: in addition to the front-end research and analysis, and post-launch planning and execution, FSOkx provides Content Development Services, which target content designed to meet a client’s business objectives.