



FIFTH THIRD BANCORP

Fifth Third Bancorp partners with Trust & Will to help customers secure their families' financial futures.

About Fifth Third Bancorp

Fifth Third Bancorp is a diversified financial services company headquartered in Cincinnati, Ohio, and the indirect parent company of Fifth Third Bank, National Association, a federally chartered institution. As of December 31, 2021, the Company had \$211 billion in assets and operates 1,117 full-service Banking Centers, and 2,322 Fifth Third branded ATMs in Ohio, Kentucky, Indiana, Michigan, Illinois, Florida, Tennessee, West Virginia, Georgia, North Carolina and South Carolina.

The Challenge

Fifth Third Bancorp identified a growing need for affordable and accessible estate planning, which was accentuated by the COVID-19 pandemic. The solution was to bring holistic financial health into focus during a time when companies and customers needed simple tools to help navigate these unprecedented times. Fifth Third determined that the majority of its customers lacked basic estate planning documents. As their commitment to helping its customers through every stage of financial planning Fifth Third Bancorp sought to provide programs that offered differentiated value to its customers.

The Solution

Fifth Third Bancorp's strategic partnership with Trust & Will addresses the need for accessible and affordable estate planning. Trust & Will and Fifth Third Bancorp co-created a marketing campaign with the goal to educate customers on the importance of estate planning, which included an educational webinar, email marketing, and an exclusive discount. This provided customers with a personalized experience, resources, and tools to feel confident in their estate planning journey. Through Trust & Will's easy step-by-step process and top-rated member support, customers are able to secure their legacies and complete their estate plans.



"Helping our customers reach their financial goals is very important to us, and we want to provide access to easy-to-use digital tools to protect their money, prepare for their futures and plan for the long-term well-being of their families."

Howard Hammond

Head of Retail Banking & Brokerage Distribution, Fifth Third Bancorp

Success Metrics

2,500+
Member Signups

In 2021, Fifth Third generated **over 2.5k member sign ups** through co-marketing campaigns, which included 3 email blasts and 1 Retirement University class.

Trust & Will is the Leading Estate Planning Platform in the U.S., helping 300k+ members nationwide prepare their estate plans. With \$30B Assets in Docs and 1,900+ 5-Star Reviews, Trust & Will helps Financial Institutions bring a modern solution to members hoping to secure the future of their loved ones.

Partner With Us

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