



Boston Financial

The leading provider of transfer agency services in the USA



Boston Financial has been offering the mutual fund industry a complete range of bundled and customized outsourcing services for over 30 years. We provide full and hybrid outsourcing services to over 140 mutual fund complexes, representing more than 7,000 fund shares, and over 26 million accounts. The immediate benefit to our clients is the ability to access and leverage the scale, experience, and technology of the industry's most diverse and largest third-party transfer agency. Whether your funds are retail or institutional based, broker or third-party distributed open-end or retirement plans, our staff of nearly 3,000 associates has the experience and knowledge to craft a solution that works for you.

Our principal lines of business are:

- Open-end Mutual Funds.
- Retirement Services
- 529 Plans

Each of these business lines is supported by a full-line of end-to-end services ranging from front-end processing of mail to compliance and distribution support services (e.g., regulatory updates, reporting and monitoring, and web-based services, and phone support). Our retirement services division services over 55 thousand plans, and more than 1 million participants, and offers outsourcing solutions to 18 institutional clients.

Despite suggestions to the contrary, at Boston Financial we believe that there is a difference when it comes to choosing a transfer agent. The difference is in the depth of experience and commitment we bring to our relationships. The benefit to you is a service provider who will shape and deliver a service plan that meets your changing business objectives, and who will be in front of you, not behind, in terms of knowing where the industry is going.

What makes our continuing leadership position possible is our continuing investment in the future. Together with our corporate partners - DST Systems and State Street Corporation - Boston Financial has arguably invested more in future technology and service enhancements, training, and our facilities, than our peer competitors. The bottom-line impact to our clients is a capability for delivering leading-edge services today and at the same time, a capability for anticipating and meeting the challenges of tomorrow.

at a glance

- Over 26 million shareholder accounts
- Over 7,000 mutual funds
- Over 140 clients
- Nearly 3,000 employees

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