



FOR IMMEDIATE RELEASE

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Marquis Adds DocuMatix Marketing Automation Solutions to Lineup

Now Offers Full Suite of Marketing Analytics, Technology Solutions, Services for Banks, Credit Unions

PLANO, Texas and DRAPER, Utah – [Marquis Software Solutions Inc.](#) and [DocuMatix LLC](#) announced today they are combining business operations to create a single company uniquely positioned to offer banks and credit unions the marketing analytics, automation and technology solutions and services they need to grow.

Marquis, based in Plano, Texas, is a leading provider of marketing analytics software and professional services for mid-tier banks and credit unions. Draper, Utah-based DocuMatix is a communications software platform provider offering solutions that allow financial institutions to conduct automated, trigger-based marketing campaigns using email, SMS text and surveys to drive customer awareness and loyalty.

“Our customers are telling us they want to purchase software and services from fewer vendors offering a broader set of solutions,” said Susan Faulkner, chief executive officer of Marquis. “Combining the deep industry expertise, analytics and professional services of Marquis and the marketing automation solutions of DocuMatix will allow us to better meet their needs.”

DocuMatix is Marquis’ first investment since it was acquired by [Falfurrias Capital Partners](#) in September 2016 as part of a broader strategy to create a single vendor offering technology solutions that deliver actionable information banks and credit unions can use to drive revenue growth and compete with larger financial institutions.

“We see compelling growth potential for Marquis and DocuMatix together given their complementary capabilities, lack of customer overlap and industry trends including rising investment in technology, marketing automation and analytics,” said Marc Oken, managing partner for Falfurrias Capital Partners. “Falfurrias looks forward to supporting Marquis as it continues to enhance its offerings for financial institutions organically and via future strategic investments.”

“DocuMatix and Marquis are two strong and well-respected brands with similar customer-focused cultures,” said Paul Jaramillo, president and CEO of DocuMatix, who co-founded the company in 1999 with chief technology officer Trent Hawes. “We look forward to working with Susan, Marc and the Marquis team to create a best-in-class suite of solutions and services that help banks and credit unions understand their customers and market products more effectively.”

Faulkner, a former Bank of America executive with deep industry expertise and experience in integrating businesses, will continue to lead the combined enterprise in her current role as CEO of Marquis. Jaramillo and Hawes will continue in leadership roles, Jaramillo as chief client experience executive and Hawes as chief product innovation executive.

The 2016 acquisition of Marquis was the latest of several financial-services investments for Falfurrias, founded by former Bank of America CEO Hugh M. McColl Jr. and former Bank of America CFO Marc Oken. The firm has leveraged its unparalleled expertise in the sector with platform investments in RegEd, a leading provider of regulatory compliance technology solutions for financial services firms, Dorsey Wright & Associates, a leader in financial market data analytics, passive indexing and smart beta strategies, and others.

DocuMatix will continue to operate from its Utah facility and maintain data centers in Utah and Nevada.

About Marquis

MARQUIS is a Plano, Texas-based company that is focused on getting results for over 400 financial institutions nationwide. MARQUIS sets its clients apart from their competition by providing expertise in data analytics, MCIF, CRM, strategic consulting, profitability and direct marketing – along with CRA, HMDA & Fair Lending compliance. For about 30 years, MARQUIS' focus has been to partner with their clients to realize provable results with its software, services and consulting. Results. Nothing else matters. To learn more, visit www.gomarquis.com.

About DocuMatix

At DocuMatix we simplify communications for credit unions and other financial institutions. DocuMatix is a trusted provider of email marketing solutions used by over 350 credit unions and banks. Our services include traditional and trigger-based email marketing, marketing automation, secure web forms, events, surveys, polls, PURLs, financial calculators, SMS text messaging and on-line elections. www.documatix.com.

About Falfurrias Capital Partners

Falfurrias Capital Partners is a Charlotte-based private equity investment firm founded in 2006 by Hugh McColl Jr., former chairman and CEO of Bank of America, and Marc Oken, former CFO of Bank of America. The firm is focused on acquiring or investing in a diverse portfolio of growth-oriented middle-market companies. By leveraging the extensive strategic and operational experience and business relationships of the firm's principals, Falfurrias Capital Partners is positioned to be a value-added partner for both its portfolio companies and its limited partners. For more information, visit www.falfurriascapital.com.

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