

THE POWER OF BEING UNDERSTOOD
ASSURANCE | TAX | CONSULTING



Jona

One of the
RSM team

FI Insights: An advanced data
analytics platform to drive your
financial institution forward

Transform your institution with the power of data.

Data analytics is central to transforming community banks and credit unions. You already have much of the data you need to enhance profitability and customer experiences. But without the right resources, accessing and understanding that data can be challenging. RSM has developed FI Insights, a data analytics platform to put that information at your fingertips, and it's paired with the experience and support of RSM's first-choice advisors along the way.

Operations leaders benefit from FI Insights as it offers the same spectrum of visibility at the branch, product and service line levels previously only available from disparate systems and data sources.

Why FI Insights?

- Time: A dashboard solution consolidates on-demand data, available immediately each day.
- Trends: Visualizations and daily updates allow you to identify trends earlier.
- Insights: A full picture of account holder activities provides enhanced customer insight.
- Resources: Your internal team can spend more time working with customers and developing strategies instead of mining disparate data sources for reporting.
- Consistency: Executive management and the board use the same data aligned with the priorities of the financial institution.



How RSM can help

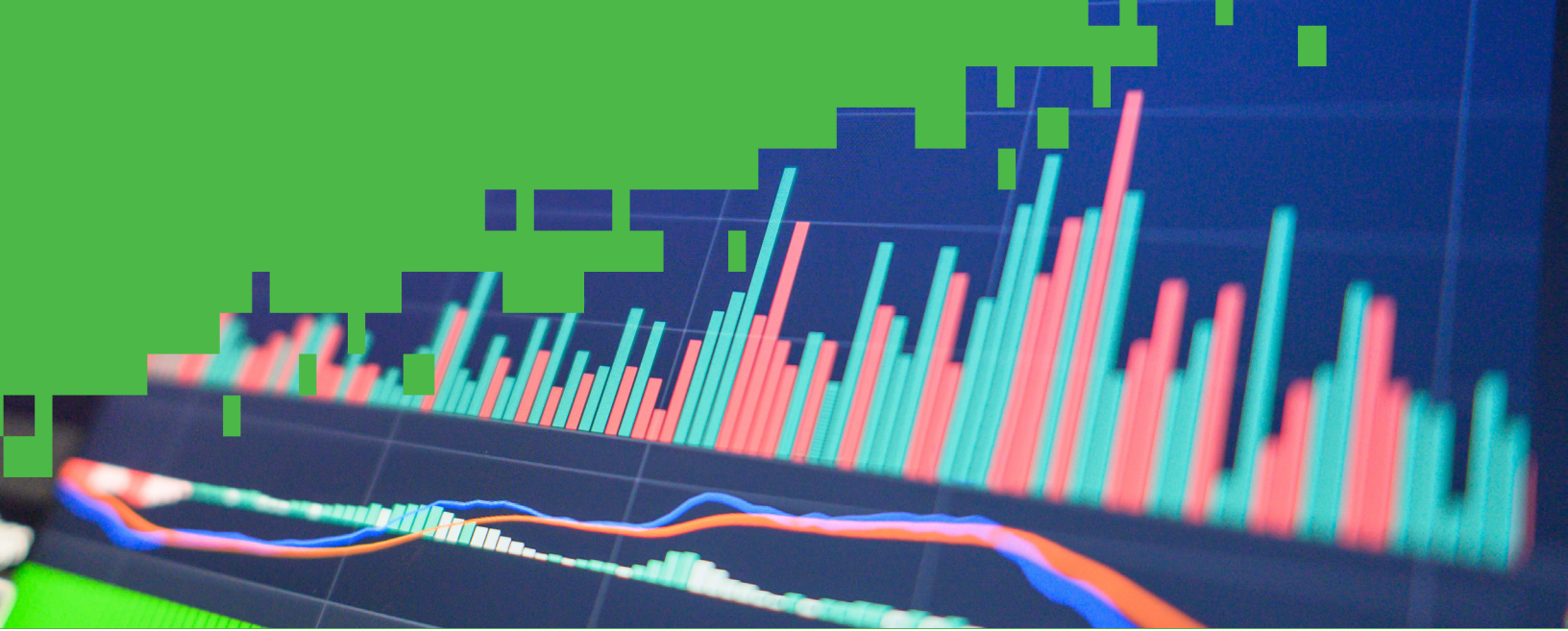
With FI Insights, RSM delivers a data analytics solution that provides community banks and credit unions with a deeper understanding of account holder activities and the opportunity to earn more business through that enhanced customer insight.

With more perspective, you can get better answers—and ask better questions.

FI Insights features include:

- Immediate access to on-demand data
- Comprehensive data integration
- Visualizations to identify trends
- Intuitive, 360-degree view of customers
- Peer analysis and opportunity scores
- Advisory resources to maximize return on investment
- Secure, cloud-based solution
- Licensing for all senior levels
- Efficient implementation
- Fixed monthly costs for licenses and advisory services

Our FI Insights platform provides a solution that offers a quick implementation with modeling and reporting based on key business drivers and account-level data. In addition, we provide advisory services to help interpret data to enable the visibility you've been seeking.



Customized navigation

In your customized dashboard, you'll be able to navigate easily across multiple pieces of data, from a high-level view of your bank all the way down to the account and customer level. This allows you to focus on the details, while also seeing the bigger picture.

On-demand data

Your consolidated data is available immediately each day, with visualizations to help you identify trends earlier and monitor changes in loan-to-deposit ratios, net interest margin and other key metrics affecting liquidity.

Peer analysis and opportunity score

Our customizable peer analysis capability shows your bank's performance in relation to that of your peers. And the opportunity score provides insight into loan and deposit pricing adjusted immediately as rates fluctuate.

Advisor resources and industry experience

Our team understands financial institutions and your unique, complex digital transformation needs, such as staying abreast of evolving technologies and complying with regulatory requirements. We have deep knowledge of the financial institutions ecosystem and functional applications that drive business processes.

Why RSM?

Our team of professionals with a deep knowledge of the financial institutions industry built FI Insights. Unlike other services on the market and in addition to the technology, we also offer advisory services to help ensure you can drive the intelligence gained from the data in your operations.

Our financial institutions technology practice leverages our proven system methodology, collaborative approach and experienced functional leaders. We have a decades-long track record advising financial institutions on adopting comprehensive and effective systems that integrate with their current infrastructures.

+1 800 274 3978

rsmus.com

This document contains general information, may be based on authorities that are subject to change, and is not a substitute for professional advice or services. This document does not constitute assurance, tax, consulting, business, financial, investment, legal or other professional advice, and you should consult a qualified professional advisor before taking any action based on the information herein. RSM US LLP, its affiliates and related entities are not responsible for any loss resulting from or relating to reliance on this document by any person. Internal Revenue Service rules require us to inform you that this communication may be deemed a solicitation to provide tax services. This communication is being sent to individuals who have subscribed to receive it or who we believe would have an interest in the topics discussed.

RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent assurance, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party. Visit rsmus.com/aboutus for more information regarding RSM US LLP and RSM International.

RSM, the RSM logo and *the power of being understood* are registered trademarks of RSM International Association.

© 2024 RSM US LLP. All Rights Reserved.

2151975