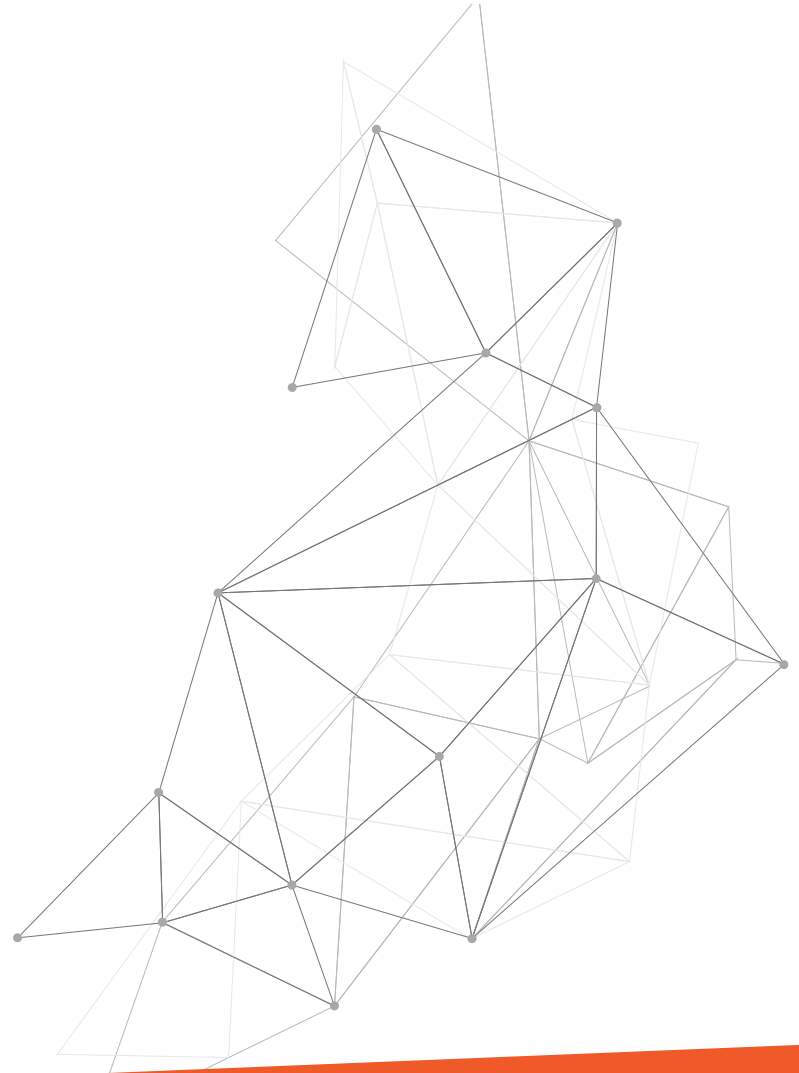
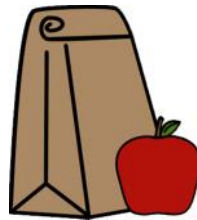


 Plansmith

Lunch 'n Learn

All About Graphs



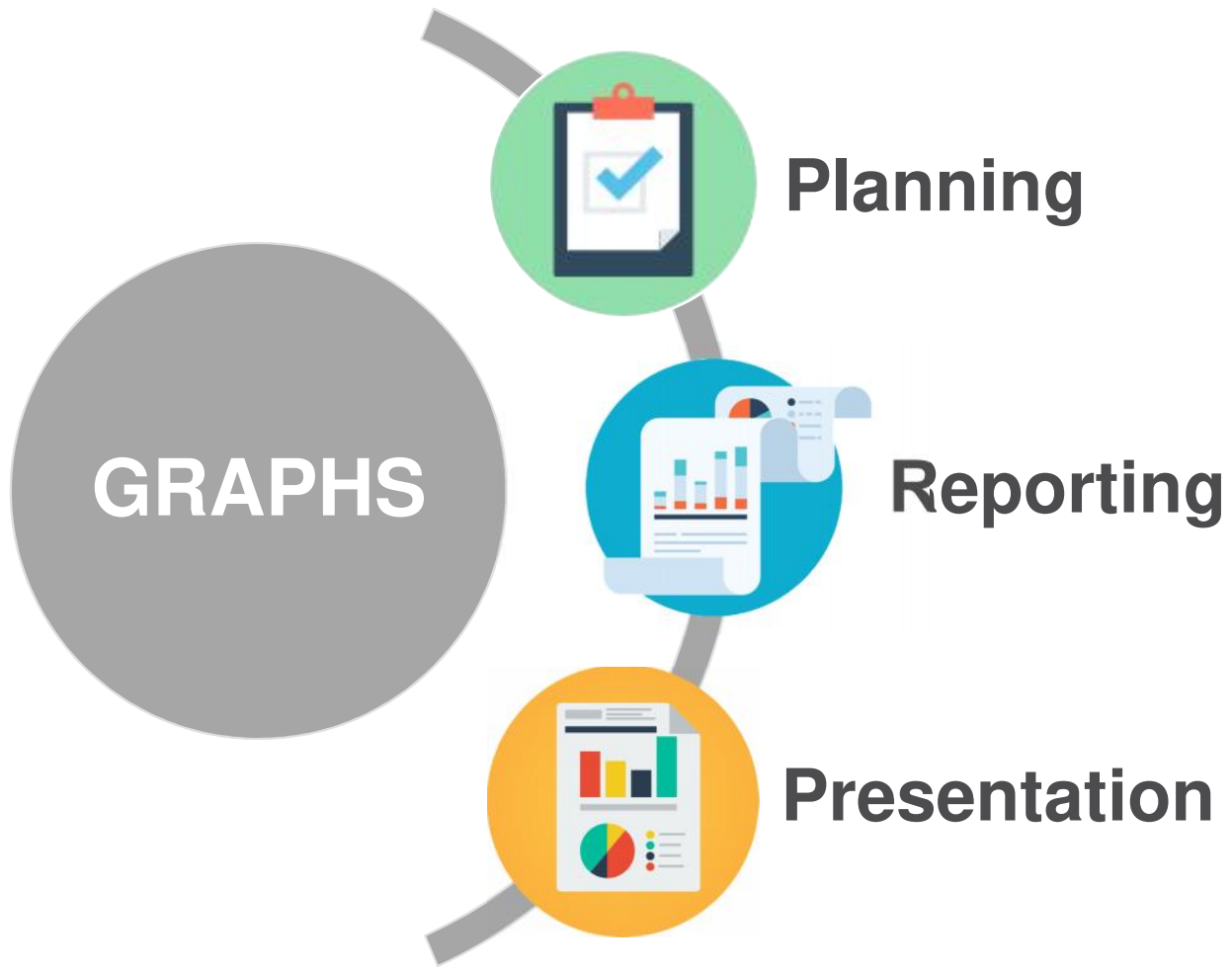
Presenter: Jenny Mello & Bill Smith

This session is design for:



All Compass Users

- Financial Compass
- Budget Compass Plus
- Budget Compass

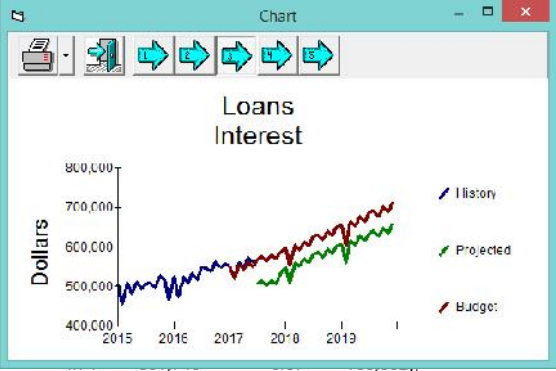
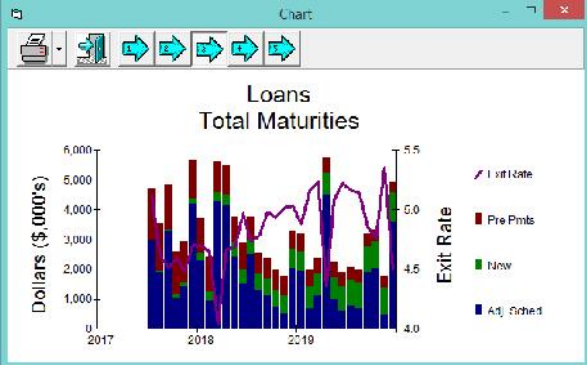


Account Projections Planning

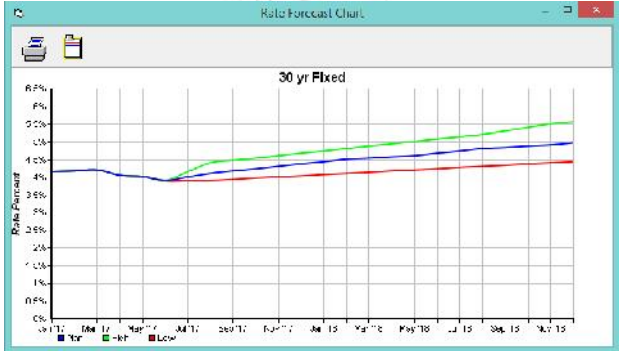
Double-click column headings

Loans (32 accounts) - Projections

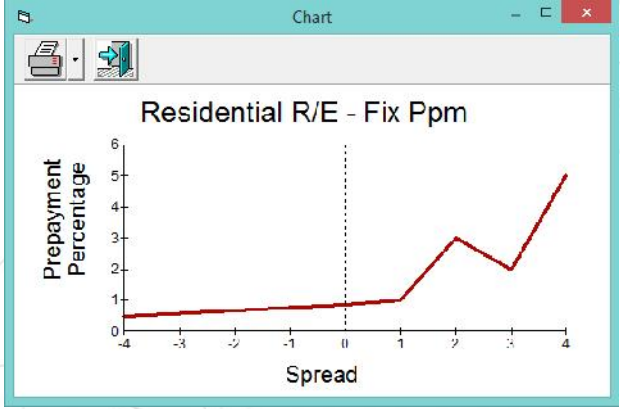
Projections		Budget	Maturity	Repricing	Variance	Fed Funds	Notes	
	EOM Balance	New Balance	Offering Rate	Total Maturities	Total Maturities Xrate	Interest	Yield	Average Balance
2017	Change	Change						
2017	Dec	144,660				557,074	4.49	146,495
2017	Jan	145,102				550,748	4.51	144,527
						521,184	4.57	144,546
						560,755	4.56	145,315
						549,349	4.64	144,052



Index Rate Projections

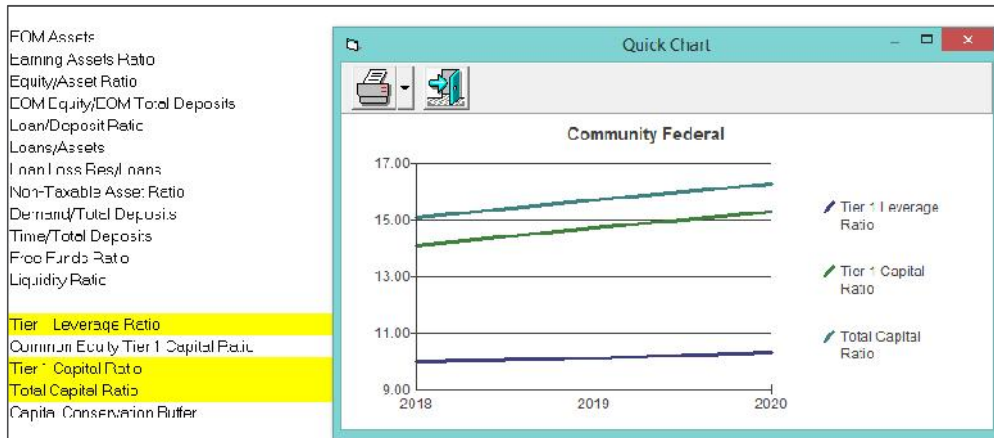


Assumptions



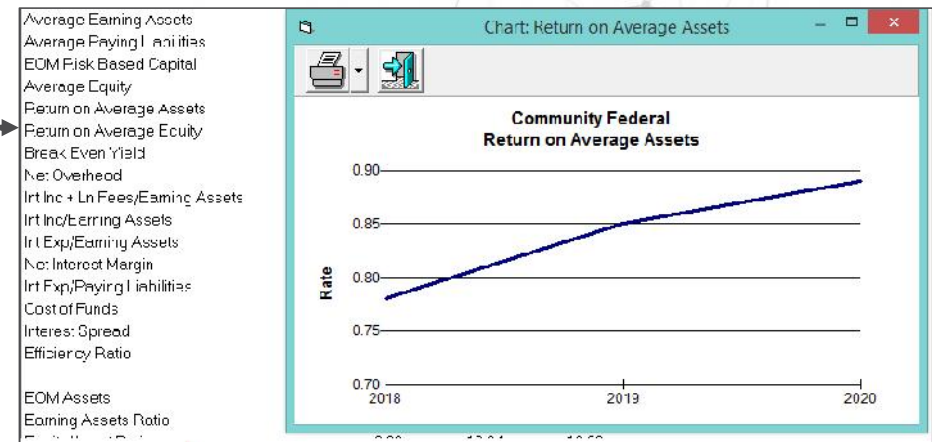
Reporting

Highlight multiple line items



or

Double-click one line



Presentation

Add new Charts

Chart Appearance

What's Next?

Thur, June 21st - Fri, June 22nd 2018 - 2-day Roundtable & Coaching Event
Friday, September 14th 2018 - Compass Advanced Coaching
Friday, December 14th 2018 - Compass Roundtable

Upcoming Lunch 'n Learns

April – Executive Dashboard
May – Risk Compass

Check out www3.plansmith.com/events-page for more event info



Thanks for attending!



Questions?

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