

PLAN FOR A BETTER TOMORROW

Less Stressful **Budgeting**
Forecasts You Can Trust
Risk Management That Works for You
 Realistic **Peer Information**
Guidance from Trusted Advisors

YOUR PATH TO SUCCESS

	Standard Individual Support	Group-Based Advanced Coaching	Custom Coaching	New User Coaching
Pricing	Included	\$450 per Person	Varies (per Institution)	\$2,500 per Institution
Delivery Method	Phone or Interactive Web	In-Person: Schaumburg, IL	Interactive Web	Interactive Web
Frequency	As Needed	1-day workshop (check our website for upcoming events)	Call to schedule	Call to Schedule
Plan Used	Institution-Specific	Demo Plan	Institution-Specific	Institution-Specific
In-Depth Review of Current Plan/Process	-	-	●	●
What-Ifs and Stress Testing Review	-	●	●	●
Excel Add-In Training	Free with Add-In License	Demo Reports	Up to 2 Custom Report	2 Custom Reports
Personalized Team Training	-	-	2-8 hours	10 hours
Pre-requisites	Trained User	Active Current User	None	None
Material Covered	All	Advanced Functionality	Custom	Comprehensive

ADVISORY SERVICES

Assumption Development & Review
 Board/ALCO Training
 Policy Development & Review
 In-Depth Training Webinars
 Strategic Planning

Sensitivity Testing
 Capital & Cash Flow Stress Testing
 Decay & Prepayment Studies
 Independent Reviews
 Backtesting

OUR TALENT

Our Experts Include Former Community Bank Presidents, CFOs, Lenders, CPAs and FDIC/NCUA Examiners

HOW TO REACH US

Plansmith Corporation | 1827 Walden Office Sq, Ste. 350 | Schaumburg, IL 60173 |
 1-800-323-3281 | info@plansmith.com | www.plansmith.com

STANDARD INDIVIDUAL SUPPORT

All Compass Licenses include standard support via phone or the web. For assistance, please contact us Monday through Friday during the hours of 8:30 AM—5:00 PM CST at **1-800-323-3281**. You can also contact us at **support@plansmith.com**. Additionally, all users have access to online webinars, product tutorials, and a Compass User's Guide. These resources can be accessed via our website at **www1.plansmith.com/resources**.

GROUP BASED ADVANCED COACHING

Throughout the year you can attend one-day group based Advanced Coaching events at our office in Schaumburg, IL. These sessions bring together Financial Compass clients who actively use the software to support their institution's board reporting, interest rate risk, budgeting and forecasting/strategic initiatives. It is intended for users who are comfortable with the basics and want to move to the next level of functionality in the software. Using a sample model, our experts will share Compass software tips, best practices and troubleshooting ideas through a combination of lecture and case study formats. In addition, we will facilitate the conversation between you and your peers, using topics and questions you select ahead of time. For more information and list of upcoming dates and locations, please check our website at **www1.plansmith.com/events**.

CUSTOM COACHING

Custom Coaching is targeted toward those who are comfortable with the basics but want to enhance their knowledge and use Compass's more advanced features. This option includes one on one coaching utilizing your own model and examples that are directly applicable to you. Our experts will meet with you via interactive web based meetings over multiple one hour sessions. The content will be tailored to your specific needs and pace. Want help completing your budget? Or understanding how best to model scenarios and compare them? Or an overview of all of the available functionality? This option may be best for you. The session fee is per Institution; you are highly encouraged to have multiple users attend each session.

NEW USER COACHING

All new clients—and new users for existing clients—should attend our New User Coaching, in which we will cover all of the information you need to successfully use Compass to help manage your organization. Budgeting, Planning, Reforecasting, Strategy monitoring, and Interest Rate Risk are discussed in detail, and customized to your needs. Our experts will meet with you via interactive web based meetings over multiple one hour sessions, focusing on your model and real life examples. The session fee is per Institution; you are highly encouraged to have multiple users attend each session.

OTHER OPTIONS?

Didn't find a standard coaching option that works for you? We welcome the opportunity to develop a custom coaching agenda that fits your needs. Please call us to discuss your options.