







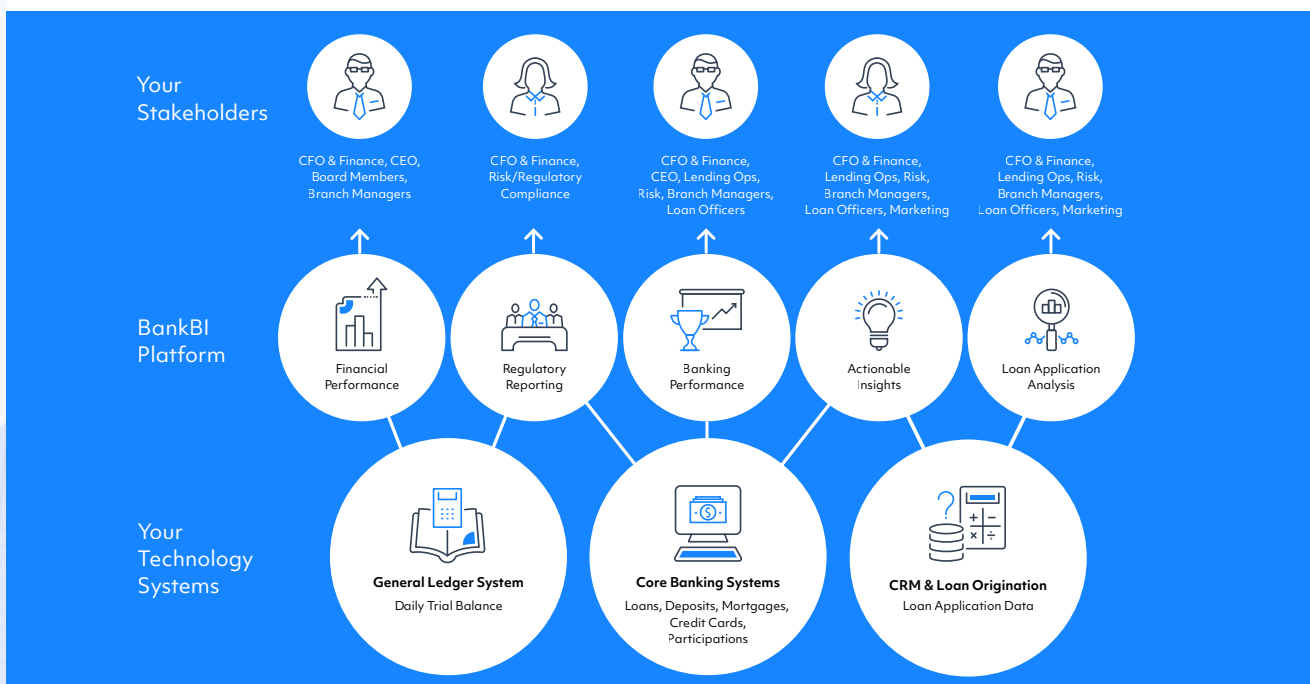
# Take Control of Financial Performance in Your Credit Union with BankBI

**BankBI gives you everything you need to manage performance and make the data-driven decisions modern credit unions demand – all from one powerful platform.**

Our cloud-based analytics solution integrates directly with your core banking system and general ledger to deliver actionable, daily insights. It's fast, intuitive, and requires no upfront infrastructure investment.

## Financial Performance Analytics As A Service

-  Pre-built, industry-standard KPI engine and out-of-the-box dashboards.
-  Cloud-based architecture – no server hardware maintenance and upgrade costs.
-  Generate marketing opportunity lists by member and product characteristics at the click of a button.
-  Filter data your way with customizable role-based dashboards.
-  Go live in weeks not months with pre-configured core banking and GL data integration.
-  Subscription-based model – access industry-leading financial performance reporting with no capital expenditure.



## Get the Daily Insights You Need to Grow your Credit Union

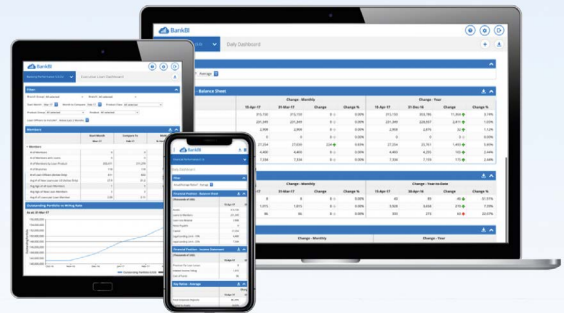
Harness daily analytics and create actionable lists of opportunities to engage with your members.

Track members/customers with deposits set to mature within 7, 14, 28 and/or days.

Locate members with approaching loan repricing dates.

Identify top accounts and top members by balance and product.

Use the cross-sell matrix to identify member 'next best' product.



### Finance Performance

Save time, cut costs, and reduce stress with automated daily analytics and reporting.

Track B/S and I/S daily movements and trends.

Track all industry-standard key ratios out of the box.

Drill through KPIs to find the root cause of movements.

Daily reconciliation of GL to core banking.

Fully automated Board and Management reporting.

### Banking Performance

Monitor new loan and deposit activity and compare against targets and scorecards.

Analyze performance metrics by branch and loan officer.

Monitor margins, cost of funds, and profitability.

Track past due trends and vintage quality over time.

Track new loan application approvals and denials by region, branch, and loan officer.

List all loans and past due by aged analysis.

### Regulatory Reporting

Simplify the entire reporting process with BankBI's fully automated solution.

Configure business rules for each credit union.

Create an audit trail of archived accounts

Plug risk weighted asset and liquidity reports into BankBI.

Supports federal and provincial reporting formats, including CSV and JSON.

Integrates with all core banking and general ledger systems.

## About BankBI

Since 2013, we've been on a mission to alleviate pressure on financial institutions across the globe. How? By harnessing the power of automation to remove laborious, manual work from your day and give you access to accurate real-time business insights.

Visit our website for more information:

[www.bankbi.com](http://www.bankbi.com)

"BankBI really spoke to what Crossroads needed and wanted. It was very user-friendly and incorporated our banking performance and our financial performance in one."

**Rhonda Fullawka**

**Crossroads Credit Union, Manager of Finance**