

# Insight

## PLANNING SOFTWARE

A credit union specific software package created  
by Aho Consulting

### Tools to Help You Manage Your Credit Union

- Conduct financial analysis comparison to credit union peers
- Develop a condensed balance sheet and income statement, including a spread analysis and comparison to year-to-date results
- Analyze the impact of developing strong member relationships
- Develop a 5-year balance sheet and income statement that ties to the Strategic "Vision"
- Create Board reports tracking major financial and membership trends
- Produce Board reports & graphs illustrating your credit unions progress toward annual goal achievement

### Easy to Use Features

- Customizable for credit unions of all sizes
- Helps credit unions analyze growth scenarios for assets, loans, capital and ROA
- Assists credit unions with creation of realistic long and short-term goals
- Creates action-planning worksheets to attain goals
- Ability to drill-down in details for loan and savings portfolio planning
- Provides interpretation of key ratios
- Easy print out of the credit unions plan

### Extra Time-Saving Planning Features

- Interactive "wizards" guide you step-by-step through the planning process
- Helps to establish 5 year "Vision" for asset growth, loan growth, membership growth & capital ratio
- Helps to establish annual business plan and corresponding strategic goals
- Produces reports and graphs to track goals
- Helps manage the Board and CEO Partnerships through measurable goal setting and tracking

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## Insight Planning Software Order Form

**Cost: \$1,495.00**

Insight Planning Software has an annual maintenance fee of \$600.00 which includes a minimum of two updates per year. Updates include the most recent national peer averages and state ratios along with program enhancements.

<b>Credit Union Name:</b>		<b>Asset Size:</b>	
<b>Address:</b>			
<b>City:</b>	<b>State:</b>	<b>Zip:</b>	
<b>Email Address:</b>			
<b>Phone Number:</b>			



**Mail this order form and your payment to:**

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Phoenix, AZ 85072

Or order online at [www.ahoconsulting.com/aho/insight.html](http://www.ahoconsulting.com/aho/insight.html)