

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

Insight Planning Software Order Form

Cost: \$1,550.00

Insight Planning Software has an annual maintenance fee of \$775.00 which includes a minimum of two updates per year. Updates include the most recent national peer averages and state ratios along with program enhancements.

Credit Union Name:		Asset Size:	
Address:			
City:	State:	Zip:	
Email Address:			
Phone Number:			



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