

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
- Develop 5-year balance sheet and income statement that ties to the Strategic "Vision"
- Create Board reports to track major financial and membership trends
- Produce Board reports & graphs of the CU's progress toward annual goal achievement

AHO Consulting was founded in 1989 to provide educational and consulting services to Credit Unions, Credit Union Leagues. Aho Consulting works with hundreds of Credit Unions conducting strategic planning workshops, revising organizational structures, preparing management and staff job expectations, administering management & CEO evaluations and compensation plans, developing staff core-competency programs and developing staff training manual and testing programs.

Easy to Use Features

- Uses an interactive-entry method so CUs can get started quickly
- Customizable to credit unions of all sizes
- Helps CUs analyze growth scenarios for assets, loans, capital and ROA
- Assists CUs in creating 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
- A budget wizard guides CUs through the budgeting process
- Easy print out of the CU's plan

Extra Time-Saving Planning Features

- Wizard guides user 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
- Provides key ratio analysis
- Helps manage the Board and CEO Partnerships through measurable goal setting and tracking
- Integrates easily for use at CUNA Financial Management Schools



Yes, please send us the INSIGHT™ Planning Software. I understand that there is an annual maintenance fee of \$550 which includes two updates per year. Updates include the most recent national peer averages and state ratios along with program enhancements. INSIGHT™ Planning Software is priced at just \$1,295

Credit Union Name _____ Assets _____

Mailing Address _____

City _____ State _____ Zip _____

Contact Name _____ Email _____

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