



## Loan Operations

- Loan Core Optimization
- Escrow Review & Automation
- PMI Processing Automation
- SBA Lending Automation
- Credit Bureau Reporting
- Shadow Loan Accounting & Automation
- Charge-Off and Non-Accrual Processing
- Loan Origination Boarding Interface

- Revenue Enhancements
- Collateral LTV Restructuring and Management
- Participation Training
- Master Agreement Design
- Specification Reviews
- OREO Asset Management and Tracking
- Employee Onboarding/Advanced Staff Training
- Custom Loan Reporting



## Deposit Operations

- Deposit Core Optimization/Spec Review
- IRA Processing/Retirement Reporting Review
- Trancode Analysis Project
- Exception Item Automated Decision Plan Setup
- Name/Address Merge Project Assistance
- Transaction Management Training/Review (TMS)
- DDA Analysis Training
- Security User/Group Training

- FMS Report Command File Training
- Safe Deposit Box Processing Review
- Exception Item Processing Review
- Item Entry System Spec Review
- Employee Onboarding/Advanced Staff Training
- Overdraft Program Implementation
- General Ledger/Integration Restructure
- Project Management Services



## Automation & Reporting

- Basic Training
- Advanced Training
- Automation & Process Optimization
- Custom Script Development Nintex RPA
- Custom Flow Development Nintex Workflow Cloud
- Custom Report Development Business Analytics

- Custom Site/List Development MS SharePoint
- Custom Dashboard Development
- SQL Integrations
- Large Data Processing
- RPA Core Conversions
- Nintex Licensing



## BSA/AML Management

- FCRM/AML Manager Optimization
- FCRM/AML Manager Alert Definition Optimization
- FCRM/AML Manager End User Training
- FCRM/AML Manager Business Analytics Training
- FCRM/AML Manager Business Analytics Custom Reports
- FCRM Risk Rating Automation

- FCRM/AML Manager Specification, Mapping and Job Process Review
- FCRM/AML Manager Watch List Optimization
- Below-the-Line and Watch List Testing
- Watch List Methodology Creation
- BSA/AML Risk Assessment/Policy/Procedure Review
- Effective Suspicious Activity Report (SAR) Narrative Writing



## Specialized Services

- Conversion Testing Management
- Fiserv Release Management
- Integration Restructure
- Security Code Structuring
- Bank Staff Training Programs
- General Ledger Design and Reporting

- Call Reporting Analysis
- Business Analytics (BA) Training
- Business Analytics (BA) Custom Report Design
- Exception Monitoring
- Loan Origination Boarding Interface
- Core Report Mining (Director)