

Budgeting and Forecasting in the SNL Banker solution

Take the pain out of your organization's budgeting process with our streamlined instrument-level forecasting tool for community banks.



Screenshots are for illustrative purposes only.

Create more accurate forecasts:

- Instrument-level forecasting gives you visibility into the existing portfolio vs. new production needs, down to the specific product/rate
- Automatically pull in up-to-date actuals from your core and General Ledger as the basis for your forecast without manually re-keying data, then re-forecast as necessary on the fly
- Better insight into your portfolios helps you create precise goals to keep your teams on track to meet organizational objectives

Shorten your budgeting cycle:

- Multiple users throughout the organization can work concurrently within a forecast while seamlessly consolidating results
- Advanced security features help you protect your data by choosing which users can view/edit sensitive data
- Since budgets are completed earlier, your finance team will have time to evaluate multiple "what-if" scenarios and select the best possible budget outcome

Budget to actual reporting:

- Publish an official budget as well as multiple forecasts to explore various what-if and rate scenarios
- Performance and yield cost ratios for budgeted performance allow you to track actual results on an ongoing basis

Expertise:

Our advisors, business intelligence analysts, data warehouse developers and product managers are committed to the success of community banks and credit unions. We're dedicated to providing top-notch customer service and helping you optimize the value you're getting from the SNL Banker solution beyond our integrated Budgeting & Forecasting module.

About S&P Global Market Intelligence

S&P Global Market Intelligence integrates financial and industry data, research, and news into tools that help track performance, generate alpha, identify investment ideas, understand competitive and industry dynamics, perform valuation, and assess risk.

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