

CaseStudy

FIPCO

FIPCO ShareFI
has become a
trusted advisor
and an extension of our team.

THE COMPANY

Location: Sun Prairie, WI
Asset Size: \$460 million
FIPCO customer since September 2019



The Bank of Sun Prairie has worked with ShareFI in the following areas: Operational Efficiency, Shared Controller, Internal Quality Control, Compliance Reviews and General Bank Consulting.

“*ShareFI has become a trusted advisor and an extension of our team at the Bank of Sun Prairie in a short period of time. Their recommendations have been spot on and they have helped us discover opportunities to streamline workflow across the bank. In a world of competition, I have found their business model to be centered around listening to the needs of their customers and being flexible in customizing solutions to meet our needs. I have been especially impressed with the skill and expertise of the staff and their depth in understanding of how things really work in small to mid-sized community banks. The ease of doing business with ShareFI has unquestionably been a value-add for us and an important part of the bank's strategy as we move forward.*”

Data compiled by: Jimmy Kauffman
President and CEO, and Chairman of the Board of Directors
Bank of Sun Prairie

Challenges

- Lack of a Budgeting Software
- Rising Audit Costs
- Bank Efficiency
- Retirement of our Head of Compliance

Solutions

- **Secondary Market Quality Control Audit**
- Our IQC program conforms to the standards of FHLMC, FNMA and MPF mortgage programs at an affordable cost.
- **Annual Budget with Monthly Support**
- Utilizing Plansmith Budget Compass, our experienced financial advisors will assist with budget preparation and monthly Board reporting.
- **Workforce Optimization Study**
- We provide staff training on Continuous Improvement and LEAN Processes.
- **Compliance Review with Mentoring**
- Our certified professionals will assist with risk assessments, documentation, file reviews, and violation mitigation.

Your ShareFI Team:



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SHAREFI
COMPLIANT. CONSISTENT. CONFIDENT.

REV. 05/20

