



*Work smart. Lend profitably.*

## Client Account Management

### Let us help you maximize your investment.

WebEquity is continually enhancing our lending software solutions to take full advantage of the latest technology advances and to address industry and regulatory needs. Our Client Account Management team is dedicated to keeping you up to date on new product capabilities. We want to make sure you are taking full advantage of the WebEquity solutions so you can meet your business objectives.

#### Tap into capabilities you currently have, but aren't using.

We want you to take full advantage of the new functionality in your WebEquity system. Our Client Account Management team can help your institution benefit from WebEquity capabilities that you may not be aware of.

#### Learn efficient new ways to work.

We know that efficiency is a huge priority with our clients – yet credit quality is paramount. Therefore, we want to make sure you are using all of WebEquity's powerful features. Here are just a few examples of capabilities that can save you time and effort while improving your credit analysis and risk management practices:

- A single system for all your loans (CRE, C&I, Ag, Construction, Small Business, and Personal)
- Quick Access to solution components
- Financial statement spreading
- Key financial ratios
- Configurable credit presentations
- Replicate your risk rating models
- Global Cash Flow analysis
- Reporting
- SBA | FSA Guaranteed forms
- Workflow capabilities
- CRM (contact management)
- Document management/attachments
- Letters, notes, links
- Credit reports
- Integration capabilities
- eSignatures
- ... and much, much more

*“The WebEquity team worked closely with us to identify and turn on features we were not utilizing in the system. This type of assistance is very valuable as it has increased our efficiency with the program making this an even more valuable analysis tool to our loan officers.”*

– Zach Messman, First State Bank, Lincoln, NE

## Receive best practice guidance.

Our Client Account Management team can share insights on best practice uses of the WebEquity software. We'll also show you easier ways to comply with regulatory requirements and industry standards – from different types of analysis you can perform, to making sure your policies are set up correctly and adhered to.

## Quickly bring users up to speed with new functions.

WebEquity offers a variety of training options that can help keep your team knowledgeable about the software functionality. Many of our training courses and resource materials are online and provide a convenient way to train new hires, including:

- Self-paced, On-demand Modules – basic courses to complete on your schedule
- Instructor-led Classes – basic and advanced courses
- Personalized Training – customized for your organization
- Other Resources – such as the Tips library, eHelp facility and Cool Features Webcasts

## Expand your knowledge of the latest WebEquity products.

We've expanded our arsenal of automated solutions to include some of the industry's best tools for simplifying lending-related processes. We'll explore how these products can benefit your lending business:

- **WebEquity® Risk Dashboard** - for stress testing and portfolio what-if analysis, fully integrated with WebEquity Lending
- **WebEquity® ALLL** - the fast, accurate tool for calculating Allowances for Loan and Lease Losses

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## Schedule a WebEquity® Check-up

Get a Check-up, and increase the ROI from your WebEquity solutions.

A WebEquity Check-up is an efficient process we have developed to help determine if there are opportunities for you to improve your use of the WebEquity software solutions. During this collaborative session a WebEquity Client Account Manager will:

- **Review** your usage patterns and current business requirements
- **Explain** helpful features in your solution and other WebEquity offerings
- **Identify** needs in areas such as user training, process enhancement, and integration with other systems (Core Processing, Loan Documentation, CRM, etc.)
- **Recommend** improvements and produce a Prioritized Action Plan document with a timeline for the steps to implement them

**Schedule your Check-up today.** Contact us at **800-264-0787 ext. 3** or email [clientmgmt@webequitysolutions.com](mailto:clientmgmt@webequitysolutions.com).

