



UNDERSTANDING BANK FINANCIALS PROGRAM DESCRIPTION

To comprehend the financial performance of your institution, employees across your organization require knowledge about your Annual Report, financial statements, earnings reports and how financial results' link to your strategy. *Understanding Bank Financials* workshop provides that understanding and a whole lot more.

LEARNING OBJECTIVES

After completing *Understanding Bank Financials workshop*, participants will be able to:

- List the sources of publicly available information for your institution's financial performance and describe the information each provides
- Discuss the key components of your Annual Report
- Explain the purpose and structure of your institution's income statement and balance sheet
- Describe each line item from the income statement and balance sheet
- Link the financial statements and financial results to your institution's strategy



FORMAT AND DURATION OF THE COURSE

The *Understanding Bank Financials workshop* is taught in a live workshop setting (we can also explore distance learning options too). The program consists of a combination of class discussions, interactive exercises and an exciting Workmat exercise where participants use your bank's-specific transactions to build an Income Statement and Balance Sheet that cuts across all of lines of business.

Modules include:

- Introduction
- Sources of Financial Information
- Annual Report
- Understanding Financial Statements Workmat Exercise
- Analyzing Ratios and Trends
- Your Responsibility Going Forward

Performance Solutions International' (PSI) instructors, knowledgeable about both the financial services industry and your bank teach the course.

PROOF OF CONCEPT

Performance Solutions International (PSI) has delivered this course for a number of our clients and it has been extremely successful. PSI has also tailored the course specifically for different audiences within our client institutions.

Understanding Bank Financials will provide your employees with a solid understanding of your bank's financials, key metrics and overall financial strategy, so they can apply that understanding to their day-to-day decision-making.

To contact PSI to get more information on *Understanding Bank Financials*, please call Chris Lawton at (973) 895-6061 or email at clawton@goto-psi.com.