



pinion



Financial Institution Services

To Improve Your Institution's Performance



Pinion promotes the well-being and growth of over 150 financial institutions, throughout the Midwest.

Focused on You

Our seasoned former financiers, tax and accounting specialists, and business consultants leverage their critical depth of experience, guiding you through important, everyday issues—to help you maximize tax advantages, minimize risk throughout the institution, and increase profitability.

Passionate

Financial Institution leaders who are passionate about both growth and community, whether rural or metropolitan, love working with our equally passionate financial-business experts. Passion creates energy, and energy creates success.

Relationship-Based

Leveraging our long-standing relationships with other financiers, regulators, and business leaders in your region, you'll tap into our social capital for negotiating power, positioning advantages, and developing strong new relationships.

Assisting financial institutions with:

- Accounting and Tax Management services tailored to your institution
- Risk Management services to quickly pinpoint and minimize risk
- Compliance for your peace of mind
- Mergers & Acquisitions so you can acquire or sell at the right price
- Strategic Planning that moves your financial institution forward

Additionally, the Financial Institutions team offers Human Resources, Loan Management, Information Systems, Operations Management, and Training services to support your organization.



Leading Expansion or Preparing for Sale

We help local financial institutions grow through acquisition and improve qualified market share. Turn to the Pinion Financial Institutions team to implement the smartest growth or exit strategy that meets your objectives, and navigate through the regulatory and compliance process seamlessly.

Cultivating Teamwork

Teamwork takes strategic initiative. Establishing common goals. Creating a harmonious work environment across financial institution locations and within the same office. Developing in-house leadership and management skills. In a coaching role, we support your focus on this worthwhile effort.

Translating Regs into Daily Ops

Running your financial institution, you have limited time to focus on integrating the continually changing regulations into day-to-day operations. Because we stay on top of the issues, decipher the rippling impact, and bring you practical approaches, you can efficiently adapt and continue to thrive.

“What sets Pinion apart is their ‘all-access’ approach to our relationship. Their dependability is second-to-none for everyone within our bank—from IT to HR—we are very comfortable in contacting them with questions (as part of the service they provide – not at additional cost). Their responsiveness, research, and solutions surrounding the complexities our bank structure presents has instilled complete confidence and trust from the Board and stockholders, as well as myself, so that I have more time to focus on other areas of the bank.”

— Randy Tegethoff, CPA, President/CFO/CIO The Citizens State Bank



Improving Your Institution's Success

Take advantage of seasoned institution-specific strategic planners; dependable and cost-effective outsourced CFO services; internal technology compliance experts; and premium tax and accounting professionals.

- Building strategic plans for growth and improved performance
- Developing a sound lending environment
- Tackling merger and acquisition issues
- Gaining peace of mind by proactively addressing regulatory requirements
- Maximizing tax advantages and minimizing risk
- Cultivating a stronger, well-functioning management team

Ready to work with people passionate about your success?
Let the **Pinion Financial Institutions** team assist you and your organization.
Call us at **316.685.0222**

Attest services provided by KCoE Isom, LLP

© Pinion, LLC, All Rights Reserved