

Balance Sheet Consulting



What is balance sheet consulting?

Balance sheet consulting is a service that reviews all aspects of a credit union's current position – loan assets, liability structure, and risk exposure – and makes recommendations as to how to address issues of concern, take advantage of hidden income opportunities, and limit risk if necessary.

Why is balance sheet consulting important?

Credit unions occasionally require fresh perspectives in the areas of balance sheet management, capital building projects, or staff/asset liability committee education. A thorough understanding of the complex implications of various balance sheet strategies – and their impact on the organization – helps credit union leaders develop targeted, goal-based plans with measurable results.

Who does balance sheet consulting help?

Balance sheet consulting helps time-limited credit union CEOs and CFOs make more educated, more insightful, strategic decisions. Using QuantyPhi's high-tech data analysis systems, our consulting experts can run "what-if" scenarios, help you plan for unpredictable market fluctuations, and show you how to find opportunity on both sides of your balance sheet. We can show you how to build a better credit union by building better balance sheet components.

Why QuantyPhi?

When it comes to the credit union balance sheet, QuantyPhi can help solve multiple challenges credit union managers and supervisory committees face. QuantyPhi's balance sheet strategists keep on top of market changes, regulatory issues, technological advances, and asset liability management (ALM) best practices, and are experts at building balance sheets.