

## REFERRAL QUALIFICATION GUIDE

At Paladin *fs* we are redefining the status quo in Core and IT banking contracts, helping community banks and credit unions stand up to the industry oligopoly and secure both better terms and pricing. We are a team of hard-hitting and trusted negotiators with a flawless track record of success.

*Paladin seeks financial institutions looking to lower their Core IT expenses, improve contract terms, and secure the best Fair Market Value possible.*

### THE IDEAL PALADIN/GCC CLIENT

- Financial institutions with **\$300M** - \$15B in assets
- Outsourced core account, item processing, internet banking, bill payment, ATM/EFT.
- Paying more than **\$30,000**/month (combined)
- Contract renewal date **30** months out

### WHICH QUESTIONS SHOULD I ASK?

- Q:** Is your renewal date less than 30 months from today?
- Q:** Are you processing with FIS, Fiserv, Jack Henry or another Core IT Supplier?
- Q:** Do you outsource (any/all) your core account, item processing, internet banking, bill payment, ATM/EFT processing?
- Q:** Are you paying more than \$30,000 per month combined?
- Q:** Is your institution greater than \$300M in Asset Size?
- Q:** Are you contemplating a merger (buy or sell) in the next 5 years?
- Q:** Are you thinking about changing Core suppliers or other strategic IT solutions?

### THE PALADIN ADVANTAGE

- **Research *before* Consulting**
  - We won't waste your time
- **\$0 Cost Reduction Assessment**
  - NO Cost & NO Risk
- **Lifetime Contract Protection Services**
  - Never overpay again!
- **Proven Results:**
  - \$137M Total Cost Reduction Since 2009
  - Average Cost Reduction of \$1.27M per Engagement
  - \$41M in Shareholder Equity Created or Saved

### PALADIN'S PROVEN PROCESS

- COMPREHENSIVE:** Experienced Review of all Current Core & IT Contracts
- QUANTIFY:** What should your institution actually be paying?
- ADVICE:** Tactics and Strategies from Former Core & IT Vendor Executives
- DATA-DRIVEN:** Compare Your Monthly Pricing vs. Peers



### LET'S GET STARTED

Qualified leads should be submitted through The CorePoint's Referral Partner site:

<http://info.paladin-fs.com/thecorepoint>

Direct all questions and support requests to Linda Stahl - National Partner Executive, Business Development

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