

Lumio Insight and Plansmith Partner to Revolutionize Financial Planning

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EINPresswire.com/ -- Plansmith Corporation, a long-time leading provider of financial institution planning software, announced a strategic partnership with Lumio Insight, a data analytics, dashboarding, and reporting solution for financial institutions. This collaboration will integrate Lumio Insight's Banking Insight platform into Plansmith's upcoming Generation 5 solution, delivering unparalleled value to financial institutions.



"We are thrilled to partner with Lumio Insight to bring advanced data analytics and insights to our clients," said Craig Hartman, Chairman and CEO of Plansmith. "By combining Lumio Insight's data-driven technology with Plansmith's industry-leading financial planning software, we will empower our clients to make more informed decisions, drive sustainable growth, and satisfy regulators."

Lumio Insight's Banking Insight platform will provide Plansmith Gen 5 users with daily data feeds and actionable insights via dashboards and dynamic reporting tools. This integration will enable financial institutions to:

- Enhance decision-making: Access critical data and analytics to inform strategic planning.
- Improve operational efficiency: Streamline workflows and automate tasks.
- Mitigate risk: Identify and address potential risks proactively.
- Enhance regulatory compliance: Ensure adherence to evolving regulatory requirements.

"Partnering with Plansmith is a wonderful opportunity to bring the power of our Banking Insight platform to a wider audience," said Jeff Fink, Co-Founder and CEO of Lumio Insight. "This integration will provide financial institutions with a comprehensive solution to meet their evolving business and compliance needs."

Plansmith Generation 5, scheduled for release in stages throughout 2025, will revolutionize the way financial institutions approach financial planning. Key features of Gen 5 with Lumio Insight include:

- Single Sign-On Integration: Enhanced security and user experience with customizable access for multi-user environments.
- Executive Dashboard: A consolidated view of key metrics for strategic decision-making, accessible by board members and other key stakeholders.
- Daily Reporting Dashboard: Timely data access through daily updates and API integration, offering flexible report generation.
- Branch/Departmental Budgeting: Comprehensive tools for managing financial performance across branches, incorporating historical data and note-logging.
- Interest Rate Risk Functionality: Integrated tools for comprehensive interest rate risk assessment and asset liability management.

To learn more about Plansmith Generation 5 and how it can benefit your financial institution, please contact Mike Bilyeu, EVP – Business Development.

About Plansmith

With over 50 years of budgeting and interest rate risk management experience, Plansmith has helped coach and cultivate thousands of powerful bank and credit union clients. Their goal is to demystify planning and ALM so all users can benefit from the ability to make better informed business decisions with sophisticated yet easy-to-use software. While other vendors assign support tickets, Plansmith's acclaimed customer service team is available via phone or email to assist in your success when you need us.

About Lumio Insight

Lumio Insight is a data-driven solutions provider dedicated to empowering progressive financial institutions. By offering simple, powerful, and scalable analytics and automation tools, Lumio Insight helps banks and credit unions navigate the complexities of the modern financial landscape. Complete with on-call support and expert guidance, clients are empowered to maximize the value of their data. Through innovation and integrity, Lumio Insight is dedicated to helping organizations thrive in any economic environment. For more information, visit lumioinsight.com.

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