UNITI • EAST

PEAK CONSULTING

2-Day Pre-Conference Training   Sept 8 - 9th, 2026

Tuesday 9/8/26	Loans *Connecticut*	Deposits *Rhode Island*	Business Analytics/ Automation *Vermont*
12:00-1:00	**Lunch - *New Hampshire Room***		
1:00-1:15	**Introduction - New Hampshire** In this session we will introduce the Peak team and review the session topics that will be covered over the next 2 days. This will allow members of your team to set themselves up for success, getting the most value from the conference.		
1:15-2:15	**Loan GL Integration: Understanding the Flow of Loan Accounting** Gain a clearer understanding of how loan transactions flow from Premier into the General Ledger and the key components that drive the accounting process. This session will demystify the relationship between loan activity, transaction codes, GL interfaces, and accounting entries, helping you better understand how transactions are recorded and reconciled. We will review common posting scenarios, troubleshooting techniques, and best practices for maintaining accurate financial reporting. Whether you're responsible for operations, accounting, or system administration, this session will provide valuable	**BPM Admin Training: Back to the Basics** Let's dive into BPM Administrator by discussing the elements you need to build the best processes for your team. We'll discuss the various Actions available, the difference between Automated and User Promted Transitions and best practices when setting up comparisons for form conditioning. If you ar enew to BPM or looking to streamline existing processes, this is the session for you!"	**Modern Report Design: From Raw Data to Actionable Insights** Stop wrestling with data and start making it work for you. Whether you are a beginner or a seasoned pro, this session dives into the essential architecture of high-impact report writing. We'll move beyond the basics of formatting and filtering to share ""from-the-field"" recommendations that ensure your bank's data is clean, clear, and compliant."
2:15-2:25	**Break**		
2:25-2:55	**Smooth Transitions: Leveraging RPA for Conversions & Acquisitions** Don't let a merger or acquisition overwhelm your operations team. This cross-functional session highlights how to deploy automation to handle the heavy lifting of data conversions. We will detail how our team assists banks with the critical transition gaps that Fiserv may not have the resources to support. Discover practical strategies to automate manual data entry, streamline loan and deposit mapping, and accelerate your conversion timeline"		
2:55 - 3:50	**General Roundtable** In this Q & A session we will take topics from all areas with everyone together as a group. We often benefit from hearing about pain points and feedback from other areas of the bank, in addition to our own. Bring your roundtable topics to this session that may not have been previously addressed or if you desire to address a larger audience.		
3:50-4:00	**Break**		
4:00-5:00	**Loan Transaction Codes: Unlocking the Power Behind Your Transactions** Transaction codes drive much of the activity within Premier and CoreAdvance, yet many institutions only utilize a fraction of their available capabilities. In this session, we will explore loan transaction codes, effective strategies for maintaining meaningful transaction descriptions, and the description hierarchy that determines what information is displayed throughout the system. We will also highlight lesser-known transaction codes, discuss how to maximize transaction code usage within TMS for improved automation and workflow efficiency, and provide a practical walkthrough of the IES Specifications to help you better understand and inventory the transaction codes configured at your institution. Attendees will gain valuable insights to improve consistency, reporting, operational efficiency, and overall transaction management.	**"Set it and Stop Chasing It: Automating Deposit Charge-Off Tracking** If your team is still manually tracking charged-off deposit accounts, it's time to simplify the process. In this session, we'll walk through how to configure the system to automatically charge off accounts after a defined timeframe, move balances between accounts and the general ledger, and eliminate the need for manual tracking. Walk away with a streamlined approach that improves visibility, consistency and day-to-day operational efficiency, without the spreadsheets and follow-up.	**Beyond Standard Notices: Crafting High-Impact Custom Communications** Are the system-standard notifications limiting your communication? Break free from ""one-size-fits-all"" templates by learning how to build custom letters and notices directly within Business Analytics. This session demonstrates how to pull deep-level data into your correspondence to create sophisticated, data-rich notifications that your core system can't produce on its own.
Wednesday 9/9/26	**Loans** *Connecticut*	**Deposits** *Rhode Island*	**Business Analytics/ Automation** *Vermont*
7:30-8:30	**Breakfast - *New Hampshire Room***		
8:30-9:40	**Loan GL Integration: Understanding the Flow of Loan Accounting** Gain a clearer understanding of how loan transactions flow from Premier into the General Ledger and the key components that drive the accounting process. This session will demystify the relationship between loan activity, transaction codes, GL interfaces, and accounting entries, helping you better understand how transactions are recorded and reconciled. We will review common posting scenarios, troubleshooting techniques, and best practices for maintaining accurate financial reporting. Whether you're responsible for operations, accounting, or system administration, this session will provide valuable insight into the loan-to-GL lifecycle within Premier and CoreAdvance.	**CD Product Specifications and Renewals** In this session, we'll discuss best practices for configuring CD products to facilitate efficient new account openings and seamless account renewals even when the term changes. By mastering these techniques, we can significantly reduce the need for closing out the CD and reopening, improve operational efficiency and enhance the customer experience. We will cover key configuration fields and renewal options to ensure accurate and flexible CD product management."	**Building Dynamic Loan Portfolio Dashboards in Power BI** Static spreadsheets are a thing of the past. Transform your loan portfolio data into a high-level visual narrative that helps executives make faster, smarter decisions. We'll demonstrate the seamless bridge between Business Analytics and Power BI, walking you through the ""must-have"" visualizations to track portfolio health, concentration, and trends.
9:40 - 10:40	**Loan Roundtable**	**Deposit Roundtable**	**Business Analytics/Automation Roundtable**
10:40-10:50	**Break**		
10:50-12:00	**From Form to Core: End-to-End Automation in Action** Discover how to break down departmental silos and bridge the gap between human workflows and digital workers. In this joint session, we will walk through a front-to-back automation process utilizing Nintex Workflow and Nintex RPA LE (Foxtrot). Using a new employee onboarding experience as our live blueprint, you'll see how a staff-submitted Nintex form routes seamlessly through an approval chain before handing off to a bot that automatically provisions the user directly into the Fiserv Premier or CoreAdvance core.		
12:00-1:00	**Lunch - New Hampshire Room**		
1:00-2:00	**Purge of Charged-Off Loans: Streamlining Your Loan Portfolio** Over time, charged-off loans can accumulate within your core system, increasing account-related costs and adding unnecessary complexity to loan reporting and maintenance. In this session, we will review the process for identifying, evaluating, and purging charged-off loans in Premier while maintaining appropriate records and controls. Attendees will learn best practices, key considerations, and common pitfalls to avoid when implementing a charged-off loan purge strategy. Leave with a practical, repeatable approach to keeping your loan portfolio streamlined, improving reporting	**IRAs Without the Headache: Simplifying Setup, Tracking and Reporting** IRAs don't have to be complicated – or time-consuming. In this session, we'll cut through the noise and show you how to confidently manage IRAs in your system, from setup to year-end reporting. You'll learn how to handle distributions, stay on top of RMDs, and navigate beneficiary and inherited IRA scenarios – all while improving accuracy and reducing manual effort.	**Exception Reporting: Silencing the Noise** The biggest challenge in exception reporting isn't finding the data; it's filtering out the noise. We'll show you how to utilize the Activity Management System and Premier modules to build ""exception-only"" reports that highlight critical issues without the clutter. Learn to create precisely tailored reports that allow your team to focus on what matters most: fixing errors, not finding them.