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Experience Matters: Engage fi Makes Waves in the Banking Industry

Consulting Firm Chosen by 12 Community Banks to Spearhead Future Growth and Innovation

Tampa, FL – [DATE] Engage fi is proud to announce new engagements with 12 banks across the U.S., demonstrating its superior domain expertise. Highlighting Engage fi's unique and competitive advantage, the partnerships with organizations range in size from \$300 million to \$6 billion and underscores the firm's industry knowledge, depth of experience, and strong vendor connections. "We're making a mark with community banks through our specialized expertise and long-standing industry partnerships," says Jenn Addabbo, co-founder of Engage fi. This strategy emphasizes Engage fi's dedication to driving innovation and growth within the banking sector.

Engage fi's comprehensive expertise across essential banking domains sets them apart from other industry consultants. The firm's team of subject matter experts in core banking, digital banking, and payment solutions offers unparalleled understanding of banking technology and vendor landscapes. Engage fi champions a project team approach, integrating closely with partner teams to ensure a unified effort towards project success.

The partnership with Community 1st National Bank exemplifies the benefits of Engage fi's approach. "Our recent partnership on a complex project involving multiple services and vendors was exceptional," shared Kevin Wagner, Senior Vice President. He praised Engage fi team's vast technology and vendor experience and specialized expertise, which played a critical role in the project's success. Wagner recommends Engage fi to any bank considering technology updates or vendor contract evaluations.

Engage fi's model of deep domain expertise and collaborative teamwork meets the essential need for expert-driven partnerships among community banks. Additionally, Engage fi's experienced conversion services team offers a notable advantage in guiding and executing platform transitions, a rare service among competitors. This blend of expertise, teamwork, and conversion support establishes Engage fi as a preferred partner for banks facing the challenges of technology innovation and implementation.

Their proven process delivers substantial benefits to their clients, specifically tailored to meet the unique needs of community banks. This process is designed to save clients both time and money by leveraging Engage fi's deep understanding of banking technology and vendor landscapes. Their approach is highly customized, ensuring that the strategy and solutions provided align perfectly with the specific objectives and requirements of every individual bank.



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From the initial project conception through to completion, Engage fi offers end-to-end support, guiding their clients through every step of the journey.

Craig Garofalo, Executive Vice President and Chief Operating Officer of Kennebec Savings Bank, attests to the effectiveness of Engage fi's methodology. "From the beginning, Engage fi demonstrated a deep understanding of our project's vision and objectives," Garofalo shares. "They meticulously scoped the project, focusing on driving our desired end result, and ensuring every aspect of the project aligned with our expectations." Garofalo highlights how Engage fi's expertise in payments and core account processing not only saved the bank significant time and money but also secured an excellent contract with optimal business terms and pricing. This testimony was echoed by all 12 new bank clients, underscoring the tangible benefits of Engage fi's tailored approach and comprehensive support.

Engage fi has become a pivotal force in bridging the gap for community banks through its deep partnerships within the banking industry. Recognizing the critical need for community banks to have strong, established relationships to navigate the complexities of the banking ecosystem, Engage fi steps in to fill this void. By leveraging its vast network of industry connections, Engage fi ensures that community banks are not left behind in the competitive market. These deep partnerships are exactly what community banks have been seeking, and Engage fi's ability to provide them marks a significant differentiation in their service offering.

Claremont Savings Bank's experience with Engage fi exemplifies the tangible benefits of such partnerships. "Engage fi's proven methodology and process made this strategic project very easy for our bank, and their established relationships with all the primary vendors across the industry proved to be invaluable," states Zachary J. Haines, Vice President of Operations. He further highlighted how Engage fi's advocacy and expert navigation through vendor negotiations ensured an excellent outcome for the bank. This approach not only simplifies the project execution for community banks but also secures advantageous positions for them in the negotiation process.

Engage fi is also leading the way with technology conversions. Their skilled team of experts uses a hands-on approach to guide and lead financial institutions through pivotal system projects. Each project's success has ensured Engage fi stands out as a leader in banking technology.

"We selected Engage fi for a multi-system project due to their proven process and deep industry expertise in payments, digital, and core banking," explains Kevin A. Kouble, Senior Vice President/CIO of Lowell Five Cent Savings Bank. He further emphasizes, "Engage fi's commitment to excellence, coupled with their understanding and responsiveness to our specific needs, made them the ideal partner for our organization." These sentiments highlight Engage fi's capability to not only lead complex conversions but also tailor their approach to meet the unique requirements of the bank, reinforcing their position as a preferred partner in the



banking industry.

Andres Pasantes, President and COO of Engage fi, expressed his excitement, stating, "Engage fi is honored to lead the charge in fostering growth and innovation for community banks. Our steadfast dedication to providing customized services for our clients is central to our mission. With a profound understanding of the hurdles and challenges confronting community banks, Engage fi is committed to cultivating partnerships that empower these institutions to flourish in a complex banking landscape, thereby securing a prosperous future for the communities they support."

About Engage FI

With over 1,500 successful projects completed, the team at Engage fi is a blend of consultants, educators, integrators, and advocates. We are laser-focused on guiding financial institutions through our proven process and enabling them to make informed, timely decisions on vendor relationships so they can change at the speed of the consumer. Engage fi has negotiated over \$3 billion in savings and incentives for our clients. We have a unique approach, and our strategic projects are as unique as the clients we serve. Let's Engage!

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