

CONNECT

Explore how your institution can manage and automate complex processes with Baker Hill NextGen® Portfolio Monitoring. To learn more, visit bakerhill.com/prm.

The Power of Data

Baker Hill NextGen® Portfolio Monitoring leverages data from your core system and external systems to help you manage risk and enhance your risk management processes. Alerts based on deposit account balance and overdraft activity, past due loan payment and line utilization alerts, and declines in business or personal credit bureau scores are just some of the data that can be utilized as part of your monitoring strategy. The data will identify problem loan indicators before delinquency occurs using complex risk scores and behavioral logic on a daily, weekly, monthly, and quarterly basis. The data can also identify cross-sell and up-sell opportunities with alerts on key account indicators. Tracking items can automatically be created and assigned to staff so you can be confident that your staff is accountable for taking action on all generated alerts.

Unmatched Expertise

Baker Hill leverages more than 35 years of proven origination and portfolio monitoring expertise. Maximize the value of your portfolio risk monitoring solution and expand the workflow by integrating the industry-leading capabilities of Baker Hill NextGen® CRM, Statement Spreading, Exception Tracking, and Loan Origination (business and consumer).



Baker Hill NextGen® Portfolio Monitoring Can:

- Redefine the way you manage loan portfolios and improve the quality of your portfolio by turning reactive, manual account review into an automated, continuous process.
- Monitor your accounts daily, weekly, monthly or quarterly – with significantly less manual intervention
- Flag high-performing loans for streamlined renewals and cross-selling while identifying and monitoring potentially troubled accounts so they don't grow into a bigger problem
- Integrate multiple sources of information about client interactions into a single platform
- Be used as a complementary piece to your existing risk management practices and policies.
- Free up your time to focus your efforts only on the areas that are most deserving of your attention

Baker Hill empowers financial institutions to work smarter, reduce risk and drive more profitable relationships. The company delivers a single unified platform with modern solutions to streamline loan origination and portfolio risk management for commercial, small business and consumer lending. The Baker Hill NextGen® platform also delivers sophisticated analytics and marketing solutions that support sound business decisions to mitigate risk, generate growth and maximize profitability. Baker Hill is the expert solution for loan origination, portfolio risk and relationship management, CECL, and analytics for financial institutions in the United States. For more information, visit www.bakerhill.com.

