



# IS **FINANCIAL PLANNING & ANALYSIS** IN NEED OF A **REMODEL?**

PFM Client Training  
April 29, 2024





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Account Executive



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**Overview**



**Demonstration**



**Q & A**

## About Synario:

- **25 years** of providing Financial Planning and Analysis solutions to our clients\*
- **Hundreds of users** over multiple verticals, with a focus on the public sector including higher education, utilities, transit, municipalities and government agencies
- **Financial modeling platform** for strategic forecasting provided through PFM Solutions LLC.

\*Disclosures: <https://www.pfm.com/disclosures>

\*Historical services previously provided by Future Perfect/Whitebirch.

# Trusted by **Forward Thinking Finance Teams**

## Higher Ed

## Utilities

## Municipal



## Transit



# Use Cases

- Customized Modeling Applications
- Risk Analysis
- Evaluation of Competing Alternatives
- Board Communications
- Short and Long-Term Financial Planning
- Mergers and Acquisitions
- Project Finance
- Profitability and Solvency
- + More...

Representative list of current Synario clients who have consented to the use of their name in marketing materials

## What To Consider...

**What are your**  
two or three  
most difficult  
items to  
model / forecast?

**Magic Wand:**  
Wave it, what  
would be better  
right away?

**What is your**  
favorite and  
least favorite  
thing about your  
current process?

## What Our Clients Ask For

**Better decisions by  
addressing current:**

- Modeling challenges
- Scenario analysis issues
- Presentation management shortcomings

# WHO? WHERE WE FIT

**Data Analytics**

**Financial Modeling**

**Synario**

**MODELING INTELLIGENCE (MI)**

**Operational Planning**

(Budget Framing/Resource Allocation)

**Capital Planning**

(Projects/Programs/Initiatives)

**Strategic Planning**

(LT Decision-Making)

**Resource Allocation/Assessment**

**Budgeting / Forecasting → simple formulas**

**Data Mining**

**Business Intelligence (BI) → statistics, trends, AI**

**General Ledger**

**ERP**

**Accounting**

**History**

[Actuals]

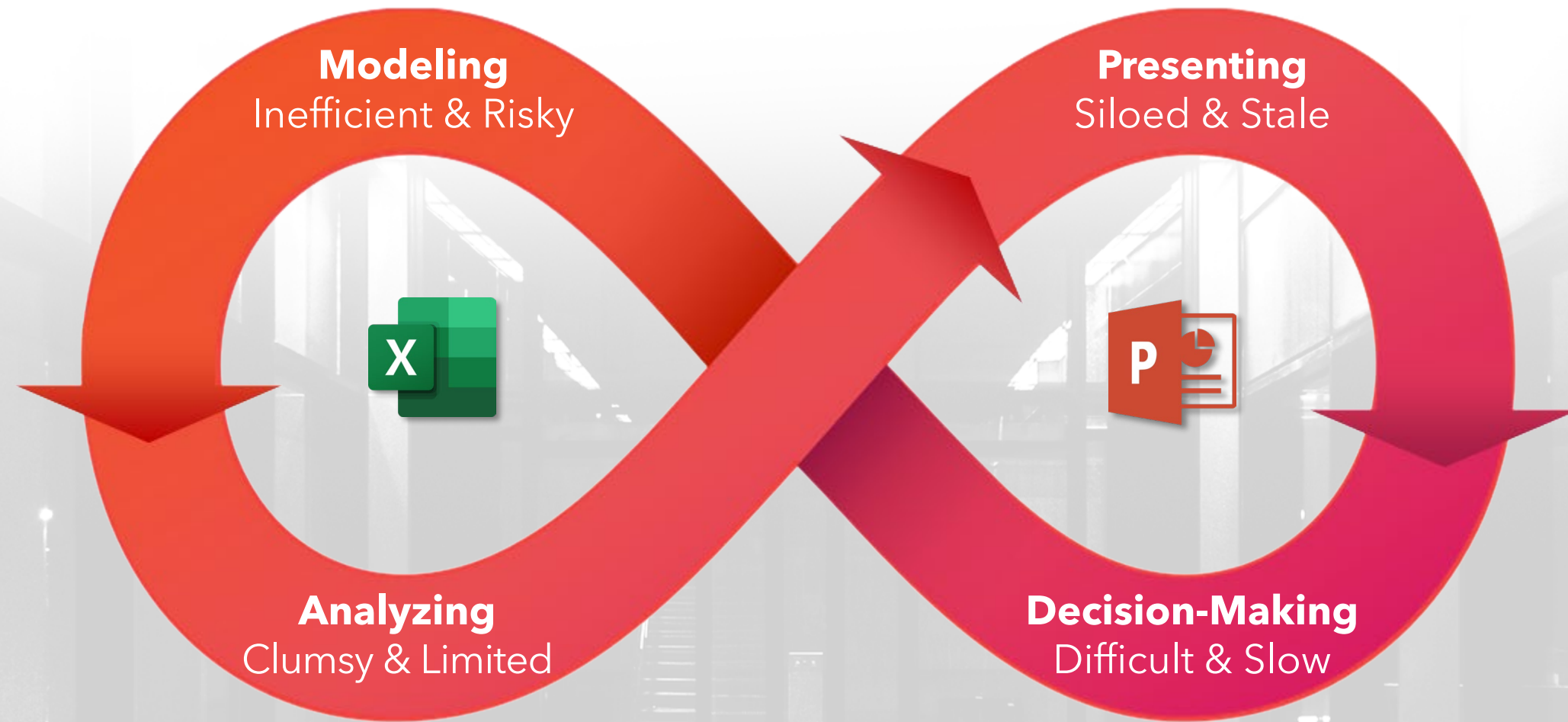
**Current Period**

[Budget]

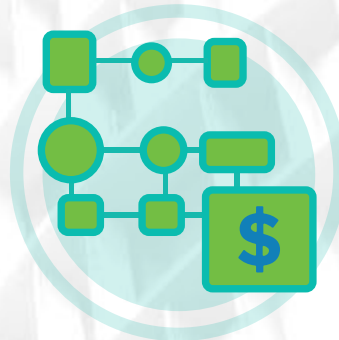
**PLANNING PERIOD**

[Projection]

# Where Spreadsheets Fail You: Modeling | Analyzing | Presenting



# New Decision Line



## Model

- Friendly Integration
- Customized Design
- Pre-Mapped Accounting

## Analyze

- Dynamic Comparisons
- Bundles Assumptions
- Full Field View

## Decide

- Real Time Results
- Differential Access (Dashboards)
- Complete Transparency



# Superior Service

## In House Excellence

Synario's team is in house, that means we're responsive and sensitive to your needs - no more bouncing around from service rep to service rep.

## With You All the Way

Our service team oversees implementation and is there for you from day one to the length of your contract, you can reach out at any time.

## Practice Makes Perfect

With hundreds of models under our belt serving thousands of users we've done this time and time again. Rest assured, you're in good hands.

“ From setup to management of model to continuing to try to model new things, the team **is extremely helpful & responsive.** ”

Sarah Mazur, Sabra Healthcare REIT

“ **Always helpful,** quick to respond, knowledgeable ”

Brittany McDowell, Wofford College

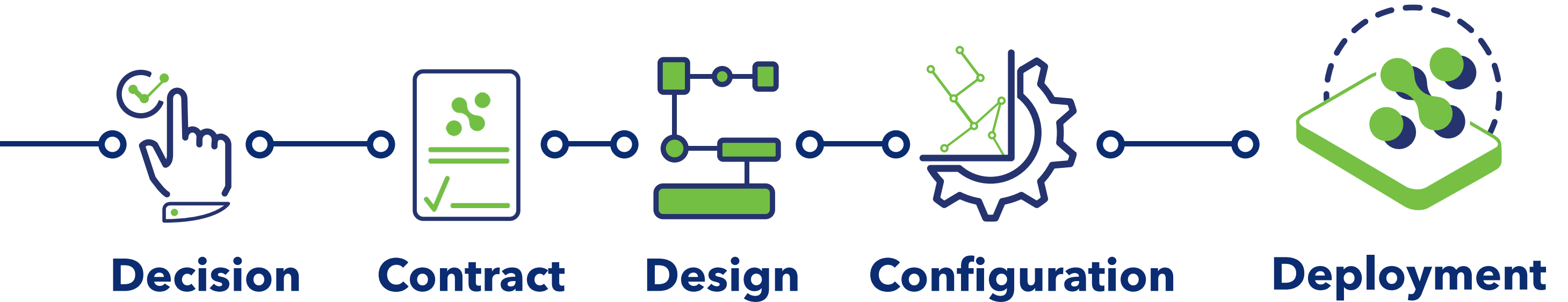
# FINANCIAL MODELING MADE **SMARTER**

## Live Platform **Demonstration**



**Alexia Pereira**  
*Product Manager*

# Implementation Timeline



**Collaborative**  
Implementation

Build and  
Maintain Yourself

~70 - 100 hours

**Assisted**  
Implementation

We Build for You

~40 - 60



# Disclosures

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