CFSI’s consulting services leverage a deep understanding of consumer needs, knowledge of financial services innovation, and unparalleled perspective on high-quality product design to guide organizations through the entire cycle of innovation, from defining enterprise strategy to launching solutions and evaluating impact.

Our work is part of CFSI’s mission to promote consumer financial health by drawing on our unique insights, principles, and data. We help organizations build high-quality financial products and services that support consumer and business success.

**Consulting Services**

**Designing Breakthrough Solutions to Consumer Challenges**

**Who are Our Clients?**
Organizations that seek to be leaders in the financial services marketplace, including:

- Prominent Payment Networks
- Premier Core Banking Providers
- Top Ten Retail Banks
- Major Credit Bureaus
- Foremost Prepaid Providers
- Trailblazing Credit Unions
- Game-Changing FinTech Startups
- Leading Alternative Data Providers
- Innovative Nonprofits
- Preeminent Community Banks and CDFIs

**Helping you Move from Idea to Impact**

Our advice is:

- **Insightful:** We draw on proprietary consumer data, including financial health segmentation, to help you meet business challenges and seize market opportunities.
- **Experienced:** We leverage market-tested approaches to help you build successful products and programs.
- **Actionable:** We help banks, credit unions, FinTech providers, and other providers incorporate established quality frameworks into product design and evaluation.
- **Tailored:** We rely on our vast experience with providers across our network to customize solutions to fit a range of provider types.
- **Connected:** We can strengthen your partnership development and vendor procurement by facilitating connections with industry leaders to ensure continued success beyond our engagement.

To learn more, download our complimentary brief, “8 Approaches to Unlocking Customer Opportunities,” or subscribe to our email alerts today.
What do past clients say?

Vancity

“We’re very proud of our work with CFSI on the Fair & Fast Loan – an innovation that has helped people who need small loans from getting stuck in a cycle of debt. We couldn’t have done it without CFSI.”

- Linda Morris, Senior Vice President, Vancity

“CFSI serves an important role of balancing the complexities of what it takes to offer responsible financial products that are sustainable to the provider yet also improve the financial health of the many consumers who are paying far too much to transact, save and borrow.”

- Anne Leland Clark, Financial Capability Director, Prepare + Prosper

“FinX taught me that non-bank financial tools can not only be expensive — they can be pretty confusing, too. I had to provide a lot of personal information and fill out several long forms during our FinX experience.”

- Julie Siwicki, USFD Research Associate and Field Researcher

When businesses focus on consumer financial health, we all win.

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