

# Stay Sharp



Consistency Is Never Over-Rated

**Sageworks "ANALYST"**

Ensure Accurate and Consistent TruGlobal™ Analysis

**Increase Consistency • Impress Examiners • Improve Credit Quality**

# Put A Fine Point On Your Financial Analysis

## Analyst™, the TruGlobal™ Credit Analysis Solution from Sageworks

Bankers and financial professionals throughout the United States have made Analyst the industry's leading choice in software for financial analysis.

Analyst's comprehensive **financial analysis suite** empowers users to create clear reports, enabling them to make timely and **accurate credit decisions**. Features include accurate global cash flow analysis, forecasting and projection models, loan analysis capability, sensitivity analysis, valuation models, loan portfolio analysis, private company industry data and benchmarking, and narrative financial analysis reports.

Make Analyst your choice and you will improve consistency, impress examiners, and increase credit quality.

Input screens mirror tax returns, facilitating data entry and minimizing errors.

**sageworks analyst** Tax Return Input Screen  
Form - 1040

Form 1040 Sched A Sched C Sched E I Sched E II Sched F 1065 K-1 1120S K-1

**Personal Tax Return: Joe Smith**  
Please enter the amounts in the boxes that correspond to the appropriate line number in the tax form. When you are done, press continue to proceed to the next schedule. Please enter only amounts that are both regular and recurring.  
TIP: Want a calculator? Use the calculator that is built for you right into each entry area/cell

Form 1040	U.S. Individual Income Tax Return	2008
7	Wages, salaries, tips, etc. Attach Form(s) W-2	75,600
8a	Taxable interest. Attach Schedule B if required	2,000
8a	Tax-exempt interest. Do not include on line 8a	0
9a	Ordinary dividends. Attach Schedule B if required	0
10	Taxable refunds, credits, or offsets of state and local income taxes (see page 20)	0
11	Alimony received	0
13	Capital gain or (loss). Attach Schedule D if required (enter regular and dependant amounts only)	15,500
15a	IRA distributions	0
16a	Pensions and annuities	0
19	Unemployment compensation	0
20a	Social security benefits	0
21	Other income. List type and amount (see page 24)	0
31a	Alimony paid	0
63	Add lines 57 through 62. This is your total tax.	0

Gross Profit Margin

Go to [www.sageworksinc.com](http://www.sageworksinc.com) to request a live demonstration of Analyst™, the TruGlobal™ Credit Analysis Solution from Sageworks.

### Bankers Who Have Analyst™ Enjoy

- ◆ Quick views of TruGlobal™ cash flow that combine guarantors, businesses, and real estate
- ◆ Dynamic narrative analysis and customizable credit memo capability to expedite loan committee preparation
- ◆ Easy-input tax return screens
- ◆ Real-time industry comparisons to make better lending decisions

### Analyst™ from Sageworks

**sageworks**®

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