

## Company Info

With more than 30 offices **Brookline Bank** delivers an expanding array of valuable banking and financial services geared to helping individuals and businesses manage their finances.

*"I would recommend CCH Tagetik unreservedly. It's a great system and I think it would be good for small and even larger institutions, so I wouldn't hesitate, and I've done that many times already."*

## FROM STRATEGIC PLANNING TO REGULATION CONFORMITY, BROOKLINE BANCORP MANAGES IT ALL IN CCH TAGETIK

### What are the main benefits of using CCH Tagetik?

*One of the benefits of using CCH Tagetik for budgeting is that our budget is factually just better. There are lots of schedules that we can load into our budgeting process, and CCH Tagetik is a great tool for getting in all that known information. The rest is in the details and the new client acquisition that you have. You just press the button then it goes.*

### How has it been an asset strategically?

*We're able to do strategic initiatives, modelling them up in the system and utilizing that for our forecast and budget. A lot of the information reporting that we have in CCH Tagetik provided due diligence documentation for a secondary stock offering we did, and again with the purchase of First Commons Bank.*

### And with regulation?

*With our regular yearly FED examinations, we have again a lot of reporting and information right at our fingertips. With a lot of our capital planning, strategic planning, all of our budgets need just a few clicks of a button to access the documentation for due diligence and our regulatory evidence. Being on CCH Tagetik and being on that single platform means the answer is contained right in there. I spend about half of my life actually logged on in CCH Tagetik and everything that you need for accounting and finance is right there.*

### Base on your experience, would you recommend CCH Tagetik?

*I would recommend CCH Tagetik unreservedly. It's a great system and I think it would be good for small and even larger institutions, so I wouldn't hesitate, and I've done that many times already.*



## Watch the video interview:

<https://www.tagetik.com/en/resources/videos/video?vid=budgeting-planning-reporting-brookline-bank>

WILLIAM HARRER  
Vice President of Finance, Brookline Bancorp

Brookline Bank uses CCH Tagetik for Budgeting & Planning and Collaborative Office