

Core Services

Guiding Financial Institutions Toward
Innovative Solutions That Unlock Future
Growth and Operational Efficiency

Serving as the connector of all systems, the core banking platform is the central hub through which a financial institution's most critical operations flow. Core banking refers to the suite of services and systems that enable banks and credit unions to manage their day-to-day functions — such as account opening, deposits, withdrawals, loan processing, and transaction management, in a centralized, digital environment. It ensures that customers can access their accounts and perform financial activities seamlessly across branches, mobile apps, and other channels.

From real-time payments and mobile banking to customer relationship management (CRM), regulatory compliance, fraud detection, and advanced data analytics, nearly every interaction and internal process is dependent on the core. It's the system of record and the engine that drives the institution's ability to serve customers efficiently and securely.

The core is the backbone of efficient, secure, and scalable financial service delivery. Selecting the right core vendor is about more than just technology — it's about choosing a strategic partner who can guide your financial institution toward its desired future state, sustain its competitive edge, and support the adoption of new innovations and emerging opportunities.

How We Help

With a dedicated focus on core vendor assessments and evaluations, we bring a deep understanding to all the various complexities. Leverage our expertise and experience to drive outcomes that significantly benefit your financial institution.

Our Process

We look at your core differently. Each client is unique, and we do not believe in one-size-fits-all solutions. Education is the basis of our approach, and we strive to ensure our clients are in the best possible position to make informed decisions, now and into the future. Our methodology ensures every process is automated, documents, and consistently delivers impactful results.

Solution Evaluation



Engage fi and the client review the RFP to identify possible gaps, review concise, high-impact demonstrations, and select vendor finalists for consideration.

Contract Negotiation



Our compressive contract negotiation strategy includes an in-depth analysis of the core account possessing platform, a thorough review of contract and business terms, and a detailed evaluation of the total cost of ownership and pricing. This approach ensures that your financial institution secures the most favorable pricing, terms, and conditions for the duration of your contract.

Conversion Services



Leverage our expert team for seamless migration of core and ancillary solutions. Drawing on our extensive expertise, we ensure an implementation approach that mitigates risk, minimizes potential disruptions, and maximizes efficiencies. Our comprehensive approach guarantees that your financial institution transitions smoothly to the new systems, allowing you to focus on what matters most – your business and your customers/members.

Why We Are Different

Our personalized approach is tailored to your financial institution's specific needs and goals. Education is the basis of our approach, and we strive to ensure our clients are in the best possible position to make informed decisions, both now and in the future.

Our people make us different. Every member of the Engage fi team has been hand-selected for their profound domain expertise and extensive industry experience. Coupling domain experience with industry expertise, our consultants come from either the vendor side of the industry, where they know the inner workings of negotiations, systems, and processes, or from credit unions and banks where they have walked in your shoes, can understand your needs, and will empathize with your current state.