



FINANCIAL SERVICES GROUP

OVER 85 YEARS
OF EXPERIENCE

MUNCIE

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WEBSITE

whitinger.com

WHITINGER FINANCIAL SERVICES GROUP

OVERVIEW

Whiting & Company has more than 85 years of experience serving clients throughout Indiana. Whether your organization needs to ensure its compliance programs meet regulatory standards or wants to improve internal performance and reporting, Whiting & Company's Financial Services Group has the industry knowledge and expertise to be a great resource for your organization.

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WE CAN PROVIDE ANY OF THE FOLLOWING SERVICES IN COMBINATION OR À LA CARTE:

- Supervisory Committee Audits
- Certified Audits
- Internal Control Assessments
- BSA Compliance Audits
- ACH Audits
- SAFE Act Audits
- Product Implementation Consulting
- Merger Planning & Accounting
- Tax Planning, Preparation, & Consulting
- Accounting Consulting
- Strategic Planning
- Board and Staff Training

Sample of Current Financial Services Clients:

Below are a few of Whiting & Company's current clients in the financial services industry:

- PrimeTrust Financial Federal Credit Union
- Afena Federal Credit Union
- Encompass Credit Union
- Industrial Federal Credit Union
- Financial Health Federal Credit Union
- Public Service #3 Credit Union
- Thrive Federal Credit Union
- Kemba Credit Union



TERRY D. BRUMLEY, CPA

MEMBER/OWNER, FINANCIAL SERVICES GROUP CHAIR

Terry Brumley has been providing tax and accounting services to financial institutions and other business clients for over thirty years. Terry joined Whiting & Company after graduating from Ball State University with a Bachelor of Science degree in Accounting. While specializing in the fields of audit and tax, particularly as they relate to the credit union industry, his greatest interest is in getting to know his clients and in helping to bring them success. Terry cares about his clients' problems, and their concerns become his concerns. He thrives on finding successful solutions to the myriad of challenges which clients face. Terry also provides accounting, tax, and consulting services to small businesses and not for profit organizations.



SARA BUCKLER, CPA, BSCACS, CUERME

SENIOR AUDITOR

Sara, a native of Bluffton, Indiana, graduated from Ball State University with a Bachelor's Degree in Accounting and went on to receive her Masters in Accounting at Ball State University as well. She received her CPA license and also maintains several Credit Union National Association (CUNA) designations. Sara has both a Bank Secrecy Act Compliance Specialist certification (BSACS) and the Credit Union Enterprise Risk Management Expert (CUERME) designation. Prior to joining Whiting & Company, Sara worked at Family Horizons Credit Union in Indianapolis as Assistant Vice President of Enterprise Risk Management. Sara started her career in public accounting where she specialized in serving credit union clients across Indiana by performing Supervisory Committee, ACH, BSA and SAFE Act attestation engagements. She also prepared 990, FIT-20, 990-T and Personal Property Tax Returns for various credit union clients.



KRISTY SPENCE

SENIOR ACCOUNTANT

Kristy Spence received her Bachelor's degree in Accounting from Ball State University. A long-time Muncie area resident, Kristy has been working in public accounting for over 25 years. As an Audit Senior, her experience focuses on attestation work for both non-profit and for-profit entities, with an emphasis on financial institutions' agreed-upon-procedure engagements, 401(k) plan audits and various industry compilations, reviews and opinion audits. Kristy also assists clients with various bookkeeping and payroll issues, as well as payroll business property, and income tax filings. Kristy has served her community as a former Board Vice President for Big Brothers Big Sisters of Delaware County and is currently a board member of Bridges Community Services, Inc.

"Whiting & Company has been a tremendous resource for PrimeTrust Financial Federal Credit Union for many years. Besides performing our annual audits and reviews, they have continually minimized our exposure to risk and have assisted in the re-engineering of our services. In short, we stay with Whiting & Company for one reason; they provide us value for our money."

Jeff Sikora, President/CEO

PrimeTrust Financial Federal Credit Union

"Encompass Credit Union has worked with Whiting & Company for a little over 10 years now and we have been very satisfied with their service. They are consistently thorough in every project they complete. On numerous occasions, they have willingly provided their expertise regarding various issues we've encountered, issues that were outside the traditional scope of services they complete on a regular basis for us. I've already recommended them to many individuals."

Don McElfresh, Vice President

Encompass Credit Union

"Whiting & Company provides the quality and professional work that you would expect from a leading CPA firm. Terry and his staff have a good understanding of credit union operations and complete their fieldwork with minimal disruption to our office. It's been a true pleasure working with them over the past 20 years."

Janet Bantz, President/CEO

Crossroads Federal Credit Union

SUPERVISORY COMMITTEE REFERENCES:

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LINDA KENNEDY

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