M&I Marshall & Ilsley Bank
Community Education & Underbanked Initiative
2010 National Interagency Community Reinvestment Conference
New Orleans, Louisiana

March 16, 2010

Ammar Askari, Ph.D.
Vice President, Strategic Sales
M&I Marshall & Ilsley Bank

- Marshall & Ilsley Corporation (NYSE: MI) is a diversified financial services corporation headquartered in Milwaukee, Wis. with $57.2 billion in assets.

- Founded in 1847, M&I Marshall & Ilsley Bank is the largest Wisconsin-based bank, with 192 offices throughout the state.

- In addition, M&I has locations throughout Arizona, Florida, Indianapolis, Kansas City, Minneapolis/St. Paul, Nevada, and Saint Louis.

- M&I also provides trust and investment management, equipment leasing, mortgage banking, asset-based lending, financial planning, investments, and insurance services from offices throughout the country and on the Internet.

- For more information, please visit: www.mibank.com or www.micorp.com.
Products - The Foundation Suite

- **Foundation Checking**
  Designed for the unbanked and for consumers with ChexSystems record. Can only be opened after completing an M&I-approved checking education programs and settling ChexSystems accounts.

- **Thrift Savings**
  A low minimum balance savings account designed for customers with limited means.

- **Credit Builder**
  A unique way to borrow money, build credit and increase savings.

Products and services are provided by M&I Marshall & Ilsley Bank and are subject to bank credit approval.
Unique Partnerships

Ways to Work
A national Community Development Financial Institution (CDFI) based in Milwaukee, WI. It provides small, short-term, low-interest loans to working poor families with challenging credit histories. M&I CEP designed a custom-tailored three-hour seminar called *Ways to Financial Success* to supplement their auto loan program.

Wisconsin Department of Correction – Reentry Program
M&I CEP designed seven seminars incorporating the 10 FDIC Money Smart units and held multiple train the trainer sessions throughout the state for the DOC’s re-entry specialist.
Accomplishments

• Since May 2005, M& CEP has organized over 1,300 formal seminars and trained over 21,000 (non-unique) participants.

• In 2009, for almost 9,000 documented surveys, the participants’ average pre- and post-survey scores on a 10 multiple-choice questions were 5.66 and 8.24, respectively. This is an average increase of 2.58, or 46%, in the number of correct answers.

• The bank has consistently received “outstanding” ratings in the CRA’s Service Test. Federal and regional regulators use M&I as an example in this area.

• Witnessed a noticeable rise in the M&I Bank’s community profile as a premier financial education provider regionally and nationally.
Awards, Publications, & Recognitions

- February 2010 and April 2008, Governor’s Financial Literacy Award, M&I Marshall & Ilsley Bank, Office of the Governor, The State of Wisconsin


- August 2008 and 2006, Youth Employment Partnership Award, City of Milwaukee

- October 2007, Excellence in Financial Literacy Education Award for Organization of the Year (For Profit), The Institute for Financial Literacy

- September 2007 and 2008, Personal Economics Program Bank Award, Wisconsin Bankers Association

- March 2007, Governor’s Financial Literacy Award, Ammar Askari, Office of the Governor, The State of Wisconsin

- September 2006, Friend of Correctional Education Award, Correctional Education Association Wisconsin