

M&I Marshall & Ilsley Bank
Community Education & Underbanked Initiative

2010 National Interagency Community Reinvestment Conference
New Orleans, Louisiana

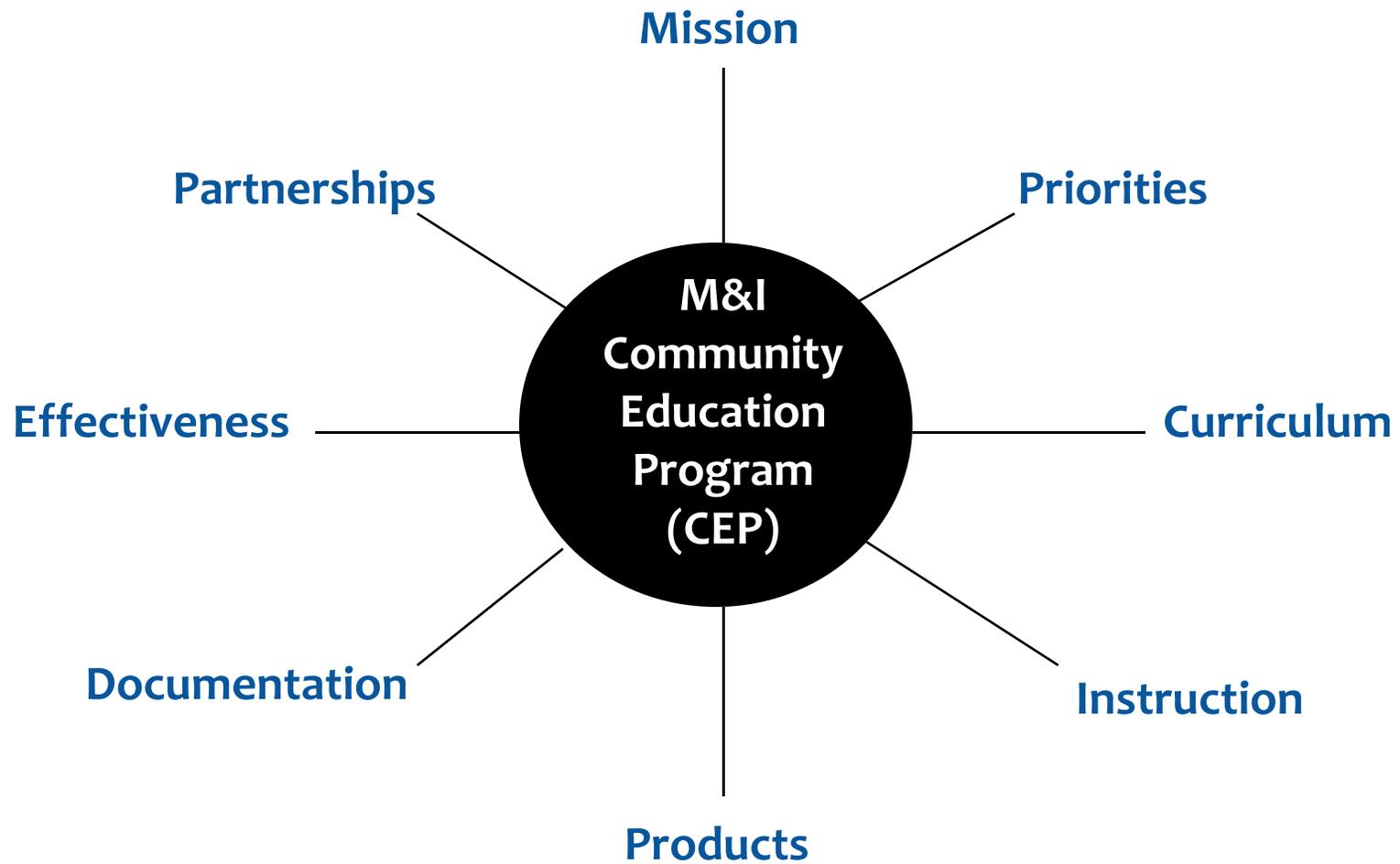
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Vice President, Strategic Sales

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.

Member FDIC.

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
- September 2009, Askari, Ammar, Interviewed and quoted in the cover-page story: "The Business Case for Financial Literacy," **U.S. Banker Magazine**.
- August 2009, Askari, Ammar "Banks and Financial Education: Integrating Practice, Products, and Partnerships." Community Investments, **Federal Reserve Bank of San Francisco**, Volume 21, Number 2.
- 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