



Abrigo Implementation Monthly

ISSUE 1 | JAN 2026

Speed, Simplicity, and Scalability

In 2025, our Chairman delivered a focused and forward-thinking vision for TRB loan origination. **The goals remains clear:** deliver consumer loans within 1 hour, provide small business loan approvals within 48 hours, and complete commercial loan approvals within 5-7 days.

To bring this vision to life, **several key initiatives were instituted.** These include reducing the underwriting effort for renewals under \$400K, streamlining consumer lot loan renewals and increasing BLA limits. Building a scalable and efficient loan origination system is the next step in this endeavor. Together, we will deliver a faster, more streamlined lending experience.

While we're still in the early stages, the project is off to a strong start. We have a dedicated implementation team in place, along with Abrigo's expertise, best practices, and proven methods, to guide us toward success.

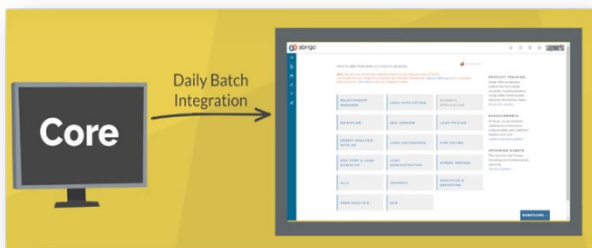
You may not have access to Sageworks yet, but now is a great time to learn key terms and concepts. Explore the links below to become familiar with some of the terminology and resources.

- [Navigating Sageworks](#)
- [Abrigo University Overview](#)
- [Abrigo Community Overview](#)

Sincerely,
Cesar Suarez

Our Core Integration is in progress!

Our team is completing the core integration so that, once live, files from the core will be pushed to Sageworks each morning. This reduces data entry and keeps information flowing.



Watch this video for an overview:
[Integration Overview](#)

Frequently Asked Question



How is our Core data integrated into Abrigo?

Using daily core extracts and an automated file transfer process, our LOS will pull customer data directly from the core, reducing manual data entry and streamlining the relationship's deposit and aggregate credit exposure summary.

Does Abrigo have downtime?

Abrigo maintains 99% uptime for continuous access. Check the status site for updates or to subscribe to notifications:

[HERE](#)

Meet the Project Team

This project brings together representatives from across departments. They are guiding the implementation, sharing feedback, and ensuring each department's voice is reflected in the design and rollout of the loan origination system.

Cesar Suarez
Gregg Booth
Chris Villarreal
Jessica Adame
Gaby Garza
Laura Villarreal
Margie Rebollar

Rebecca Rodriguez
Ricki Wilson
Marie Deleon
Michael Elsik
Cassandra Jasso
Ed Bird
Ronda Johnson



Spotlight Feature: Customer Summary Your One Stop Shop



The **Customer Summary** provides a single, comprehensive view of customer and loan data. It eliminates the need to track interactions through spreadsheets, email logs, calendar invites, or scattered notes. By consolidating information in one place, it helps the lending department work more efficiently and offers a complete 360-degree view of each customer and their relationships.

From the **Customer Summary**, you can quickly search by name, group, customer number, or loan number. As you type, results appear dynamically, making it easy to locate records. At the group level, you can also view connected people, businesses, and contacts, giving you an overall picture of the borrower and their relationships.

By streamlining access to information and presenting it in a single location, the **Customer Summary** supports higher-quality service, proactive risk management, and more accurate forecasting.

[Video Link: Customer Summary](#)