

PERFECTING THE LOAN INTERVIEW

OPPORTUNITY

*Capture Sales
Opportunities
and Create an
Unforgettable
Member Experience
every time.*

THIS ONE-DAY STIMULATING, PRACTICAL APPROACH WORKSHOP PROMISES TO INCREASE KNOWLEDGE, SKILLS AND CONFIDENCE WHEN CONDUCTING AN INTERVIEW.

Participants will use the most effective loan interviewing framework and follow a step-by-step approach. They will analyze interview types and techniques and conduct in-depth analysis of five challenging case studies.

LEARNING OUTCOMES:

UPON COMPLETION OF THIS COURSE YOU WILL BE ABLE TO...

- Implement the 'Best Practices' Loan Interview Framework
- Conduct a professional interview with a personal touch
- Solicit information that will assist in better understanding member needs
- Complete a loan application more effectively
- Build long term member relationships
- Identify sales opportunities and discuss options with confidence

SEPTEMBER 16TH, 2015 · HILTON GARDEN INN, MISSISSAUGA

PERFECTING THE LOAN INTERVIEW



WHO SHOULD ATTEND:

- Those employees wishing to improve their loan interview skills
- New employees responsible for taking loan applications
- Employees being cross-trained for this important task
- Employees requiring refresher training
- Employees who have not had the benefit of formal training
- Employees wishing to find new ways to capture sales opportunities



INSTRUCTOR BOB MOSEY

Bob Mosey is recognized by Ontario credit unions as a highly respected specialist in all areas of retail lending and collections. With over 35 years' experience Bob was a Regional Manager of a highly successful Financial Services organization. Amongst his many accomplishments he was the top Canadian Regional Manager in sales and profit for over five consecutive years. Bob also is accredited with opening the first high ratio mortgage division with outstanding results. He is an excellent instructor who has a unique approach to the challenges of today's competitive environment. Bob teaches the Advanced Retail Lending Course at PCG School, How To Collection Series and many other retail lending courses with outstanding evaluations.

LOCATION: **Hilton Garden Inn Toronto Airport West**
1870 Matheson Blvd., Mississauga, ON L4W 0B3
Telephone: 905-361-6305

DATE: Wednesday, September 16, 2015

TIME: 8:45 am to 4:30 pm

EARLY PAYMENT REGISTRATION FEE & MEETING PACKAGE:

Early Registration Deadline - Friday, August 14, 2015

- \$555.00 + HST = \$627.15 + \$83.00 + HST = \$720.94

REGULAR REGISTRATION FEE & MEETING PACKAGE:

- \$655.00 + HST = \$740.15 + \$83.00 + HST = \$833.94

FEE INCLUDES:

- Training Material, Continental Breakfast, Lunch and 2 Nutrition Breaks



REGISTRATION FORM – PERFECTING THE LOAN INTERVIEW

Name: _____

Title: _____

Credit Union: _____

Address: _____

_____ Postal Code: _____

Telephone: _____ Fax: _____

Email: _____

Payment Enclosed in the amount of \$ _____

Cheque to Follow

Make cheque payable to Level Five Strategic Partners Inc.

TO REGISTER

Return the completed registration form to:

Jan Hall, Training Coordinator

Level Five Strategic Partners Inc.

27- 4444 Eastgate Parkway,

Mississauga, ON L4W 4T6

Tel: 905-602-0644 Ext. 0

Fax: 905-602-0063



www.levelfive.ca