

# 'HOW TO' PERFECT THE LOAN INTERVIEW

CONDUCTING AN EFFECTIVE LOAN INTERVIEW CAN CREATE AN UNFORGETTABLE MEMBER EXPERIENCE!



THIS ONE-DAY STIMULATING, PRACTICAL APPROACH WORKSHOP PROMISES TO INCREASE YOUR KNOWLEDGE, SKILLS AND CONFIDENCE WHEN CONDUCTING LOAN INTERVIEWS.

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

## YOU WILL LEARN HOW TO:

- Solicit information from the member to properly assess the loan and better understand their needs;
- Interview evasive members successfully and with confidence;
- Deal effectively and professionally with difficult/delicate loan situations, such as excessive debt, gambling, divorce, legal and other issues;
- Keep the interview on a professional level but with a personal touch;
- Communicate with members at a new level;
- Gain a deeper understanding of the importance of the interview in order to build a long term member relationship.

HOMEWOOD SUITES & HAMPTON INN, TORONTO

**TLi**

THE LEARNING INSTITUTE

a division of Level Five Strategic Partners Inc.

# 'HOW TO' PERFECT THE LOAN INTERVIEW



## WHO SHOULD ATTEND:

- Lending Officers who wish to improve their skills and confidence when conducting a loan interview
- New lending staff responsible for conducting loan and/or mortgage interviews
- All employees with lending responsibilities



**FACILITATOR**  
**Bob Mosey**

**LOCATION:** **Homewood Suites & Hampton Inn**  
5515 Eglinton Ave. West  
Toronto, ON M9C 5K5  
Telephone: 416-646-3000

**DATE:** Thursday, October 10, 2013

**TIME:** 9:00 am to 4:30 pm

## TO REGISTER

*Return the completed form to:*

**Jan Hall, National 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

## REGISTRATION FEE:

- \$395.00 + HST = \$446.35

## Multiple Attendee Discounts:

- \$350.00 + HST = \$395.50  
If You Register 3 or More

## DAY MEETING PACKAGE:

- Includes breakfast, lunch and break refreshments -  
\$57.50 + HST= \$64.98

**TOTAL COST: \$511.33**

**PROGRAM  
AVAILABLE  
IN HOUSE**

## REGISTRATION FORM – 'HOW TO' PERFECT 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.*

**LEVELFIVE**  
strategic partners inc.

[www.levelfive.ca](http://www.levelfive.ca)