

## Service Representative Form Scenario 1

As a service representative, your job is to help Members apply for loans and offer them additional products that will benefit them. Here is the loan application process:

1. Fill out the Loan Application below
2. Review the decision with the Member. - Page 2
3. Ask the Member to accept any products that they are approved for. - Page 3
  - a. Member must initial for products that they will accept.
  - b. Explain additional documents required.

### Your Credit Union Loan Application

**Name:** \_\_\_\_\_

Type of loan needed:

Personal    Credit Card    Overdraft Protection    Auto Purchase    Auto Refinance    Other

Amount needed:

\$ \_\_\_\_\_

Purpose:

\_\_\_\_\_

Employment and Residence information:

Gross monthly income: \$ \_\_\_\_\_

Current Employer: \_\_\_\_\_      Length of Employment: \_\_\_\_\_

## Loan Decision – APPROVED! – Page 2

Review the decision with the Member.

### Decision Delivery

Mr. Peterson is approved for:

- \$20,000 auto loan; 2.9% at \$450/month

### Additional Approved Offers

- \$10,000 credit card at 10.5%, free balance transfers, no annual fees
- Free Auto Insurance Quote

# Sales Form – Page 3

Ask the Member to accept any products that they are approved for.

- a. Member must initial for products that they will accept.
- b. Explain additional documents required.

Member Must Initial For Sale	Product	Required Documents
_____	Auto Loan \$20,000	<b>Insurance Card, Registration Card</b> and recent <b>loan statement</b> are required within 30 days. Please return at your convenience with these documents.* Date Member will return _____. *Loan process will be completed when Member returns with the required documents.
_____	Credit Card \$10,000	None
_____	Insurance Quote	Phone # _____ Best Time To Call _____