

# Interpreting Credit Reports for Sales Opportunities



This program will detail how to read and act on credit reports for sales opportunities. Your front-line and business development staff will learn:

- How, at account opening and periodic review, a great amount of new business can be discovered in the relationships your members have with other financial institutions. Staff will learn how to recognize this new business, transfer the business to your CU and expand your members' deposit-based relationships with your credit union. Staff will recognize opportunities and make successful sales recommendations in less time.
- How to listen for, or see upon account review, opportunities to capture loans that members hold with other financial institutions. Chances are that your CU offers better terms, creating more cash flow in your members' lives.

**Speaker: Jeff Rendel**, CSP, is President of Rising Above Enterprises. He works with financial services providers that want deeper market penetration, committed customers and engaged, committed workforces. As a former Federal regulator with the U.S. Treasury's Office of the Comptroller of the Currency, Jeff examined a wide array of the nation's banks – small, medium and large.

**WHEN: January 7, 2010**

**TIME: 11:00 am – 12:00 am EST**

**Educational Investment: \$199** per telephone connection.

*Unlimited Listeners and Free Audio Archive available for 21 days after the session.*

Cancellation: Refunds will be issued, less a \$50 administration fee, up until the handouts and access information are emailed

*If you have not received your handout materials 3 days prior to session, contact the Education Department.*

**For more info...**call us at **800-572-7359** or **423-899-2425 x 119** or **138**

**FAX: 423-899-8726** **MAIL: P.O. Box 21550, Chattanooga, TN 37424**

Sign Us Up!

**Interpreting Credit Reports for Sales Opportunities  
January 7, 2010**

Credit Union \_\_\_\_\_

Contact Person \_\_\_\_\_

Email Address \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_



**Distance Learning**

Donate to the Herbert Ellison Scholarship Fund: \_\_\_ \$25 \_\_\_ \$50 \_\_\_ \$75 \_\_\_ \$100 \_\_\_ Other

**Payment Method:**

\_\_\_ Enclosed is a share draft/check for \$ \_\_\_\_\_ payable to Tennessee Credit Union League.

\_\_\_ A share draft/check for \$ \_\_\_\_\_ payable to Tennessee Credit Union League will follow.

\_\_\_ I authorize Vol Corp Credit Union to debit the credit union account for \$ \_\_\_\_\_

Account #: \_\_\_\_\_ Authorized Signature: \_\_\_\_\_

(Requires prior completion of Authorization Agreement for Direct Payments [ACH Debits].)