

Financial Counseling for CU Loan Officers



In a challenging economy credit union members may need extra help managing their finances. It is important for today's loan officers to have a basic financial counseling model handy to help members establish or re-establish good credit histories, streamline their financial management, and ease their cash flow crunch.

This distance learning session addresses

- Today's challenging environment.
- Why "financial counselor" should be in every loan officer's job description.
- Serving and lending to different segments.
- Discussing credit reports with members.
- Using a financial counseling model.

Speaker: Rick Menton is President of Menton Consulting, Inc. His consulting practice focuses on providing credit unions with strategic management and planning facilitation, project management assistance, executive recruitment, and seminar and workshop presentations. Prior to forming Menton Consulting, Inc., he spent 23 years with the Minnesota and Oklahoma Credit Union Leagues in senior management positions.

WHEN: April 7, 2010

TIME: 11:00 am – 1:00 pm EDT

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!

Financial Counseling for Loan Officers
April 7, 2010

Credit Union _____

Contact Person _____

Email Address _____

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Distance Learning

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

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

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