

Business Development: Building a book of business for your credit union

Forum overview:

Cooperative Business Services, LLC and its staff of business lending professionals will instruct class participants on the foundational elements of commercial loan business origination and portfolio growth. This one day course will provide detailed instruction in all areas that are important to a successful commercial loan business development professional.

In our Level I and Level II courses you will :

- Gain an Understanding of the what a complete loan package looks like for underwriting review
- Participate in a detailed discussion on how to develop, maintain and grow a solid network of referrals
- Participate in a detailed discussion about how to build and adhere to a business plan for loan origination.
- Gain an understanding of the purpose of weekly business calls
- Participate in a detailed discussion regarding business call management tools such as ACT for database management
- Learn how to qualify a viable business loan opportunity
- Participate in a practice session that will enable you to work through several business call scenarios / opportunities
- Participate in a review of material discussed and applied during the course.
- Learn how to market and promote business lending services for your credit union.
- Learn how to “close the deal” using a variety of closing techniques.

Who will benefit?

Level I and Level II courses are each designed for credit unions employees who are in a full time commercial loan business development role for their credit union.

Location: Cincinnati, Ohio

Dates Offered: Please visit www.cbscuso.com for dates & registration deadlines

Cost: Level I (one day course) - \$275
Level II (one day course) - \$275

**Attendees will be on their own for lunch*

