



# **Uncovering Financial Needs**

**Allows bankers to have empowering conversations on credit, investment, retirement and education.**

For bankers who have completed product knowledge and credit training.

## **Uncovering Financial Needs**

Uncovering Financial Needs helps reverse the current erosion of financial skills knowledge in the banking workplace. This one-day class provides a solid foundation for today's bankers who have sales skills, but are often lacking in basic bank knowledge or experience.

### **The facts:**

Using case studies, role plays and UFNCalcs, bankers learn to motivate their clients to take action using bank products. A powerful computer-based financial application, UFNCalcs, is provided for fast and effective presentations of information to clients. This macro-encoded spreadsheet is Excel-based and user-friendly. It requires no knowledge of Excel to use. Consistent and reliable, UFNCalcs builds credibility for consumer bankers.

## **Basic course concepts:**

Uncover clients' savings and credit needs by:

Quantifying for clients, the impact of taxes, inflation and procrastination on their savings and investment goals.

Assisting clients to set realistic financial goals by matching the objective with the type of investment.

Helping clients plan for the future cost of education and retirement by helping clients take advantage of their closing windows of opportunity.

Reducing the cost of credit by refinancing or accelerating payments can create investment and other financial opportunities.

## **After attending Uncover Financial Needs, bankers will be able to:**

Quickly be able to show clients, in dollars and cents, how a bank product will benefit them.

Easily be able to perform "what-if" calculations for clients that will result in increased cross-selling opportunities.

Build credibility because they will be able to offer a level of advice and understanding that many bankers cannot.

Identify additional client needs based on a better understanding of appropriate questions and assumptions.



**For more information call us at 425-643-3363 or visit us at [www.questacorp.com](http://www.questacorp.com)**