Credit Union Report {{cl\_report\_num}}

Closed Loans vs. Credit Pulls Visual Overview

Version {{cl\_report\_v}} – Data as of {{cl\_report\_m}} {{cl\_report\_d}}, {{cl\_report\_yr}}

# Executive Summary

The **Closed {{cl\_yr}}** folder includes {{cl\_qtd}} **loans funded in {{cl\_fund\_m}} {{cl\_fund\_yr}}**, alongside a total of over **{{cl\_cred\_pulls\_qtd}} credit pulls** for the same period.

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# High-Level Trends

|  |  |
| --- | --- |
| **Category** | **Insight** |
| **Loan Count** | {{cl\_qtd}} loans funded in {{cl\_fund\_m}} {{cl\_fund\_yr}} |
| **Clear to Close Volume** | {{cl\_cleared\_qtd}} loans cleared to close in {{cl\_fund\_m}} |
| **Sent to Branch Activity** | {{cl\_sent\_branch\_qtd}} loans sent to branch in {{cl\_fund\_m}} |
| **Pull-to-Close Ratio** | Ranged from {{cl\_pulltoc\_ratio\_min}}% (e.g. {{cl\_pulltoc\_name\_min}}) to {{cl\_pulltoc\_ratio\_max}}% (e.g. {{cl\_pulltoc\_name\_max}}) — showing wide variation in efficiency across the sales team |

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| {{ report\_3\_closed\_pulls\_by\_branch\_img }} |
| {{ report\_3\_closed\_pulls\_top30\_img }} |

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| {{ report\_3\_loan\_officer\_by\_efficiency\_top30\_img }} |

{% if show\_appendix %}{{p appendix\_sd }}{% endif %}