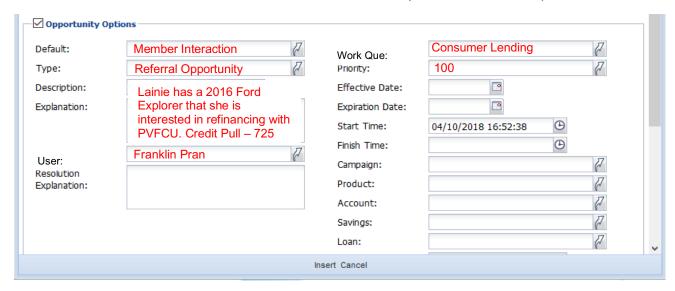
KeyStone Opportunity Tab Training Answer Key – Practice Referrals

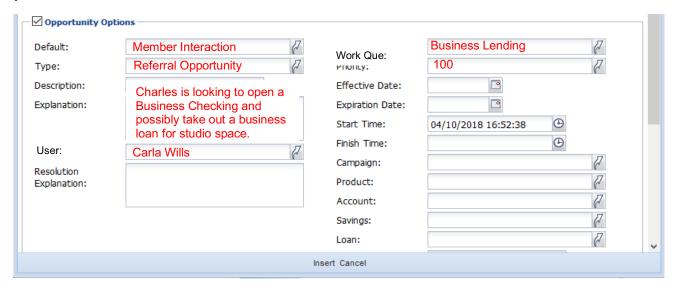
<u>Referral Scenarios – Independent Work</u>

To evaluate Opportunity Tab competency, employee homework entries in KeyStone should resemble the following entries

Scenario #1 – Independent: Lainie McCoy, Member 00006, has a car loan at BB&T for her 2016 Ford Explorer. She is wondering what PVFCU's auto loan rates are currently, and if she is eligible to refinance her vehicle loan with the credit union. How will you refer Lainie's request?



Scenario #2 – Independent: Charles Shroden, Member 00007, started a side business giving trumpet lessons to high school students in his area. With the extra income Charles has coming in, he thinks he needs to open a Business Checking Account. He is also considering renting a larger space for lessons, as his living room is not working out well. What referral opportunity do you recommend for Charles?



KeyStone Opportunity Tab Training Answer Key – Practice Referrals

Scenario #3 – Independent: Penelope Rand's, Member 00008, father-in-law passed away recently and left a small inheritance for Penelope and her husband, Brody. Penelope handles the family finances, and doesn't know what to do with money. She is planning to just deposit it into her and Randy's Savings Account, because it seems like the safest option. Who would you refer Penelope to, using the Opportunity tab?

