

# Connect

What is your preferred name?

Tell me about yourself. Business? What is your Story? (past, present, future)

What brought you to Numerica?

Who will be on the account?

Benefits of membership and membership fee.

# Anticipate

How do you bank now? What types of accounts do you have at other FI's?

What services do you like? Dislike?

How do you deposit your paycheck?

What is your preferred method of paying your bills?

How can we support you in meeting your financial goals?

# Relate

Recommend products/services applicable to member.

# Enhance

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What plans do you have for the future?

We like to stay in touch:

What's the best way to contact you?

What's the best alternative way?

If we have to leave a message would you prefer it be detailed or not?

We have several locations around town, which area is most convenient?

NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

ACCOUNT: \_\_\_\_\_

# Connect

# Anticipate

# Relate

# Enhance

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