



# Customized Product Training for Financial Institutions

## Product Training Using Your Products! At Your Finger Tips! Anytime!

DVR Learning offers customized product training using your specific product information. Training is offered in individual product suites. The following is representative of what may be included in each suite. Suites will be modified according to the specific products and needs of your organization.

### ❖ Orientation

This suite is included when investing in any of the available product training suites.

- Welcome Message from the President
  - Customer Supplied Audio/Video
- How to Uncover Customer Needs
- Applying Product Features, Benefits and Values
- Optional Treasure Hunt and Completion Status
- Program Navigation Tips

### ❖ Convenience Services Suite

This suite includes:

- Telephone Banking
- Direct Deposit Services
- Safe Deposit
- Bank by Mail
- Cashier and Traveler's Checks
- Wire Transfers
- Savings Bonds
- Commemorative Coins
- Internet Banking

### ❖ New Employee Orientation

This suite includes:

- Company Policies
- Dress Code
- Telephone Etiquette
- Safety

### ❖ Personal Banking Suite

This suite includes:

- Checking (Including Features & Benefits of Each)
  - E-Checking
  - Free Checking
  - Student Checking
  - Regular Checking
  - Interest Checking
  - Premier Checking
  - Senior Checking
- Savings (Including Features & Benefits of Each)
  - Money Market Savings
  - Money Market Index
  - Holiday Savings
  - Youth Savings
  - Student Savings
  - Regular Savings
  - Premier Savings
- HSAs - General Information
- CD - General Information & Terms
- Debit Cards / ATM Cards
  - Visa Check Card
  - Elan Credit Cards
  - Select Awards Platinum Card
  - Cash Rewards Platinum Card
  - Travel Rewards Platinum
  - Platinum
  - College Rewards Card
  - Young Adult Card
  - Secured Visa
  - Accessing/Submitting Applications
- Identity Theft Insurance



For a demonstration visit [www.dvrlearning.com/bpt](http://www.dvrlearning.com/bpt)



## Customized Product Training for Financial Institutions *(continued)*

### ❖ Business Banking Suite

This suite includes:

- Checking
  - Business/Commercial Checking
  - Small Business Checking
  - Business Checking with Interest
  - Small Business Checking with Interest
  - Organizational Checking
- Savings
  - Business Statement Savings
  - Business Money Market Savings
  - Business Money Market Index Account
  - Business Certificates of Deposit
- Cash Management
- Business Debit / ATM Cards
  - Visa Business Check Card
  - Elan Visa Business Card
  - Elan Visa Business Travel Card
  - Elan Visa Purchasing Card
  - Elan Visa Corporate Card
- Merchant Credit Card Processing
- Employee Benefits
- Money Fund Swap
- Payroll Direct Deposit
  - How to access and fill out applications

### ❖ Lending Suite

This suite is geared toward frontline staff to gain general understanding of each of these areas and which options best fit customer needs.

- Commercial Loans
  - Commercial Credit Cards
  - Agricultural Loans
  - Lines of Credit
  - Guaranteed Loans (SBA & WHEDA)
  - Construction Loans
  - Letter of Credit
  - Equipment Loans
  - Working Capital and Other Financing
  - Real Estate Loans
  - Term Loans
- Personal Loans
  - Auto
  - Installment
  - Personal Credit Cards
- Mortgage Loans
  - The Home Buying Process
  - Home Purchase Options
  - Refinancing
  - Construction Loans
  - Lot Loans
  - Bridge Loans
  - Home Equity Lines of Credit
  - Home Equity Loans

### ❖ Investment/Wealth Management Suite

This suite is geared toward frontline staff to gain general understanding of each of these areas and which options best fit customer needs.

- Introduction to Investments - Identify Customer Needs
- Compliance – What You Can and Cannot Say
- Mutual Funds
- Individual Stocks
- Corporate and Government Bonds
- Tax Free Municipal Bonds
- IRAs (Roth and Traditional)
- Simple IRA plans, 401Ks, SEP, Keogh
- College Savings Plans
- Variable and Fixed Rate Annuities
- Coverdale Education Savings Account (CESA)
- Personal Trust Services
- Estate Planning/Administration

