

Bank Client Activity Sheet

Conversation Guide

BE=Bank Employee, C=Client

BE: Please have a seat. How can I help you today?

C: Well, I'm interested in taking out a mortgage, but I would like some information first.

BE: I'd be happy to answer any questions you have. What would you like to know?

C: Well for starters, what kind of mortgages do you offer?

BE: We have a variable rate mortgage and a fixed rate mortgage.

C: Could you explain the difference please?

BE: Sure. (*Explains Different Mortgages*).

BE: Do you have any questions regarding what I just told you?

C: No. I'd like to apply for the fixed rate mortgage.

BE: Ok. I'll need to set up a bank profile first. So I'll need to ask you some questions about your personal finances? Can you spell your name for me?
(*Bank employee starts a credit evaluation and asks questions about the client's personal finances*).

Fill out this table by asking bank employees about their financial products.

Bank Accounts	
Product 1: _____	Product 2: _____
Credit Cards	
Product 1: _____	Product 2: _____
Mortgages	
Product 1: _____	Product 2: _____
Business Loans	
Product 1: _____	Product 2: _____

What products did you apply for?

Bank Account:

Why?

Credit Card:

Why?

Mortgage:

Why?

Business Loan:

Why?

In this role-play, you are a bank client. You have to find out about various financial products such as credit cards, mortgages, business loans and savings accounts. First, you must inquire about the different products and then you must choose one and create a credit profile for the bank. The bank employee will ask you questions about your financial history. The bank needs to know about your monthly income and expenditures.

