

**INCENTIVE TRACKING SHEET-
Relationship Call Dept**

4/1/2019

Name:

Month:

	Member name	Account #	E-Stmt & Online Banking	Loan Referral	Loan App	Loan Funded	Checking	DD	DC	MM	CD's	S&S	Date of Transaction	Family Account	Total										
1																									
2																									
3																									
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DOLLAR AMOUNT			E-Stmt & Online Banking	Loan Referral: \$5			Checking	DD	DC	MM	CD's	Swipe	MDC	Family Acct.											
				\$0.50	Loan Application 1st Mtg: \$50, 2nd/HELOC: \$25, Auto Loan: \$10												\$5.00	\$5.00	\$2.00	\$3.00 for	\$3=2k	& Save	\$1.00 each	\$3.00	
					Loan Funded 1st Mtg: \$100, Commercial: \$50																				
PAID ON INCENTIVES											\$6=10K	\$1.00 each			Total										
											\$10=10k+	\$10=10K+													

Credit Card Balance Transfer
\$4.00 per thousand \$0.00-\$5,000.
\$5.00 per thousand \$6,000-\$10,000
\$6.00 per thousand \$11,000.00 and above

* Credit Card Applications: Existing loan-Incentives are not paid to lower rates or increase of limit on existing accounts, unless a balance transfer is also completed (increase balance). New credit card applications will receive the incentive.

* If unable to get a loan application, but able to connect the member to a Loan Officer, an incentive of \$5.00 will be paid.

* Mortgages: \$5.00 will be paid for connecting member to Loan Officer. If an application is received back, an additional \$50.00 will be also paid. If we fund the loan for the member you will get an additional \$100.

* \$5.00 'referral' incentive will be paid if a new loan is opened within 30-days of the relationship call when a loan application is not captured during the call, and the member expressed interest/intent (noted in Tracker)