INCENTIVE TRACKING SHEET-
Relationship Call Dept

3/28/2019 **Name:** **Month:**

	Member name	Account #	E-Stmt & Online Banking	Loan Referral	Loan App	Mortgage Loan Funded	Checking	DD	DC	MM	CD's	S&S	MDC	Family Account	Date Opened/ Completed	Total
1																
2																
3																
4																
5																
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DOLLAR AMOUNT PAID ON INCENTIVES		E-Stmt & Online Banking	Loan Referrals: 1st or 2nd Mort: $5.00, Other Loans: $1.50	Checking	DD	DC	MM	CD's	Swipe & Save	MDC	Family Acct.	
		$0.50	Loan App: Credit Card or Personal: $5, Auto Loan: $10, 2nd Mort: $25, 1st Mort: $50	$5.00	$5.00	$2.00	$3.00	$3= up to $2k $6= $2k-10k $10= over $10k	$0.50	$1.00 each	$3.00	Above Total Earned:
			Mortgage Loan Funded: 1st Mtg: $100, Commercial $50									

Credit Card Buy out	
$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	
Total Earned:	

* Auto Loan Aplications are for purchases or refinances brought from an outside lender
* Auto Equity Loans are considered a Personal Loan.
* Credit Card Applications: Existing loan-Incentives are not paid to lower rates or increase of limit on exisitng 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 $1.50 will be paid. If a loan application is captured as a result, the application incentive is forfeited unless it is a mortgage (see below)

* Mortgages: $5.00 will be paid for connecting member to Loan Officer. Additional incentives will be paid when the application is received and mortgage loan is funded.

* Referral incentive will be paid if a new loan is opened within 60-days of the relationship call when a loan application is not captured during the call, AND the member expressed interest/intent (noted in Tracker)

Supervisor Approval & Date: _____