



Loan Growth and Sales Management

How to lend, track, and price your way to a satisfied membership and healthy bottom line.

**Are you
maximizing
your growth
potential?**

WHEN:

June 10th and 11th

WHERE:

The Houston Club
Downtown Houston

COST:

FREE for partners of
American Service Group

TO SIGN UP, CONTACT:

MARK SCHULTZ
mschultz@
americanservicegroup.com
713-927-6558



This 2 day course will combine classroom instruction and peer to peer discussion in a new, exciting, and completely unique format.

- You will learn what is working for other credit unions.
- You will learn from other credit union's mistakes.
- You will learn from our experienced instructors.
- You will be exposed to real world examples to help you ...
 - Safely reach 80%+ loan to share without indirect lending
 - Motivate your staff to lend and cross-sell
 - Fund at least 80% of approved loans
 - Improve lobby procedures to speed closings
 - Determine if your policy is prohibiting growth
 - Increase your ROA
 - Increase your yield
 - Track and price non-interest income opportunities in relation to industry benchmarks... and much more!!!

Who Should Attend?

- Your Lending VP or manager should definitely attend IF they are empowered to enact change within your credit union.
- Any CEO, senior manager, or board member that is hesitant to focus on sales and growth should consider attending.
- The worst thing you can do is send someone who is going to run into a brick wall when they return to the credit union with new ideas!

Meet our Instructors

MARK SCHULTZ is the Director of Sales and Training for ASG. A 2007 graduate of Southwest CUNA Management School, Mark has spent the past 10 years training credit unions how to protect their members and significantly boost their non-interest income through the proper coaching, tracking, pricing, and presentation of loan protection products. Prior to working with credit unions, Mark was a District Manager for the largest credit insurance company in Texas and worked as a sales trainer and management consultant for automobile dealerships.

GALLI DAVIS is the VP-Lending at Fort Worth City Credit Union. A 2008 graduate of Southwest CUNA Management School, Galli is a sought after speaker and consultant by credit unions looking to safely grow their loan portfolios. Galli has spoken at conferences and credit unions across the Southwest U.S. and consistently receives high marks on his evaluations due to his innovative thinking and ability to motivate loan staff. A former finance manager at a high volume Ford dealership, Galli also spent 5 years as the Vice President – Lending at a \$140 million credit union in West Texas



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The Houston Club is located at:

811 Rusk Avenue
Houston, TX 77002

9:00 a.m. to 4:30 p.m. (both days)

Lunch will be provided free of charge both days

There are multiple hotel options downtown within walking distance
or a short cab ride to The Houston Club

Club Quarters

www.clubquarters.com
from \$104 per night - 3 blocks away

Magnolia Hotels

www.magnoliahotels.com
from \$209 per night - 4 blocks away

The Lancaster

www.thelancaster.com
from \$249 per night - 4 blocks away

Hyatt

www.hyatt.com
from \$209 per night - 5 blocks away

Marriot

www.marriot.com
from \$189 - \$199 per night - 4 blocks away
(Residence Inn & Courtyard By Marriot - Downtown)

Alden Hotels

www.aldenhotels.com
from \$209 per night - 6 blocks away

Doubletree Hilton

www.doubletree.hilton.com
from \$239 per night - 5 blocks away

Hotel Icon

www.hotelicon.com
from \$149 per night - 7 blocks away

Space is limited so email sscogin@americanservicegroup.com or
mschultz@americanservicegroup.com today to reserve your spot(s).

Maximum of 3 attendees per credit union please.