

MSR Mentor Program Procedures

MSR's and Assistant Managers will undergo additional training on New Accounts and Lender during week 4 as described below. Upon returning to the branch after completing their training they will be mentored by a fellow MSR or Assistant Manager. During the following 2 weeks they will work closely with their new mentor to further develop their understanding of New Accounts and Lender.

4th Week: New Employee Training Continues (1-3 days)

During this time the employee will attend 1 day of Gold Medal Service and Sales (all employees) and 2 days of New Accounts and Lender Training (MSR's and Assistant Managers only) at the Main Office.

- After required training is completed the New Employee will have completed Training and will return to their branch or team.
- The Trainer will email the MSR Mentor Packet to the both the Manager and the MSR Mentor.
- The MSR Mentor Packet will include:
 - New MSR /Mentor Checklist
 - New MSR Training Evaluation (during Mentor period)
 - MSR Mentor Payroll Form

5th & 6th Week: At the Branch or with Team

During this time the employee is developing their skills with the assistance of their Mentor.

- At the end of the two weeks the Mentor, Manager, and the New Employee will complete the New MSR/Mentor Checklist and the New MSR Training Evaluation signed by the Mentor, Manager, and the New Employee.
- The Mentor Packet will be returned to the Training Team with all the above mentioned forms completed.
- The Mentor will continue to offer assistance and support and will gradually ease back to their normal responsibilities.

New MSR/Mentor Checklist

Employee Name: _____

Team: _____

| Employee Initials | Mentor Initials | Topics |
|--------------------------|------------------------|--|
| | | New Account Procedures: ID, Chexsystems, DBC, Checks, etc. |
| | | Forms: Membership Application, Loan Application, CD Form, etc. |
| | | Account Closing Procedures |
| | | Loan Documents: where to find, what's needed, how to print & complete |
| | | Loan Closing Packages: how to assemble, what to send where and when |
| | | Loan Closing: how disburse proceeds, calculate fees, and close |
| | | Home Equity Loans and Lines: application process, disclosures, O&E and flood verification, loan documents, fees, and closing |
| | | Credit Life and Disability |
| | | Gap and Warranty |
| | | Cross-selling |
| | | New Member Contact Program |

The above referenced information has been reviewed and initialed by the Mentor and New Employee.

New Employee Signature: _____

Date: _____

Mentor Signature: _____

Manager Signature: _____

NEW MSR TRAINING EVALUATION

Name: _____

Team: _____

Manager/Mentor: _____

Dates Mentored: _____

| New Accounts | Exceeds Expectations | Meets Expectations | Needs Improvement |
|--|-----------------------------|---------------------------|--------------------------|
| Navigation and Understanding of System | | | |
| Policies and Procedures | | | |
| Forms | | | |

| Lender | Exceeds Expectations | Meets Expectations | Needs Improvement |
|--|-----------------------------|---------------------------|--------------------------|
| Navigation and Understanding of System | | | |
| Loan Guidelines | | | |
| Forms and Documents | | | |
| Closing | | | |

Comments:

New Employee's Comments:

Employee Signature: _____

Date: _____

Manager/Mentor Signature: _____

Date: _____

MSR Mentor Payroll Form

Mentor: _____

New Employee: _____

Dates Mentored

Week #1

Week #2

From: _____

From: _____

To: _____

To: _____

Manager's Signature: _____

Mentor's Signature: _____

**Mentor will be paid a total of \$40.00 for the two-week period.