

These guidelines were created to prepare the student for the Financial Consulting Event.

2022-2023 Topic:

For 2022-2023 you will assume the role of a financial consultant to a local bank.

The bank is looking to close some of its brick-and-mortar locations and transition more of its services to an online/virtual platform. The bank is seeking your recommendation on what services could be transitioned to an online-only banking platform without compromising customer service to its customers.

Guidelines for the format of the entry.

Title page will include:

FINANCIAL CONSULTING EVENT

Name of high school

School address

City, State/Province ZIP/Postal Code

Name of participant

Date

The title page will NOT be numbered.

Table of contents:

The participant will prepare a Professional Selling fact sheet. The fact sheets, in outline form shall be limited to a maximum of 10 pages (not including title page or table of contents). The fact sheets must include:

- I. EXECUTIVE SUMMARY
- II. AN ANALYSIS OF THE CUSTOMER AND HIS/HER NEED FOR THE PRODUCT/SERVICE
- III. DESCRIPTION OF THE PRODUCT/SERVICE BEING SOLD
- IV. FEATURES AND BENEFITS OF THE PRODUCT/SERVICE BEING SOLD
- V. OBJECTIONS THAT THE CUSTOMER MAY RAISE DURING THE PRESENTATION
- VI. SUGGESTION SELLING ITEMS RELATED TO THE PRODUCT/SERVICE
- VII. BIBLIOGRAPHY
- VIII. APPENDIX