



### Task-based Activity Cover Sheet

**Task Title:** Your Banking Options – Welcome to Libro

<b>Learner Name:</b>	
<b>Date Started:</b>	<b>Date Completed:</b>
<b>Successful Completion:</b> Yes <input type="checkbox"/> No <input type="checkbox"/>	
<b>Goal Path:</b> Employment <input type="checkbox"/> Apprenticeship <input type="checkbox"/> Secondary School <input type="checkbox"/> Post-Secondary <input type="checkbox"/> Independence <input checked="" type="checkbox"/>	
<b>Task Description:</b> Learners will understand about additional services Libro provides its members	
<b>Competency:</b> A: Find and Use Information	<b>Task Group(s):</b> A1: Read continuous text
<b>Level Indicators:</b> A1.1: Read brief texts to locate specific details A1.2: Read texts to locate and connect ideas and information	
<b>Performance Descriptors:</b> see chart on last page	
<b>Materials Required:</b> <ul style="list-style-type: none"><li>• Pencil or pen</li></ul>	



**Task Title: Your Banking Options – Welcome to Libro**

Credit Unions and Banks have brochures that help customers understand what services they provide. Look at the handout “Welcome to Libro”.

**Learner Information and Tasks:**

**Task 1:** List 5 Additional Services that Libro provides to its customers.

**Task 2:** How does Libro make decisions?

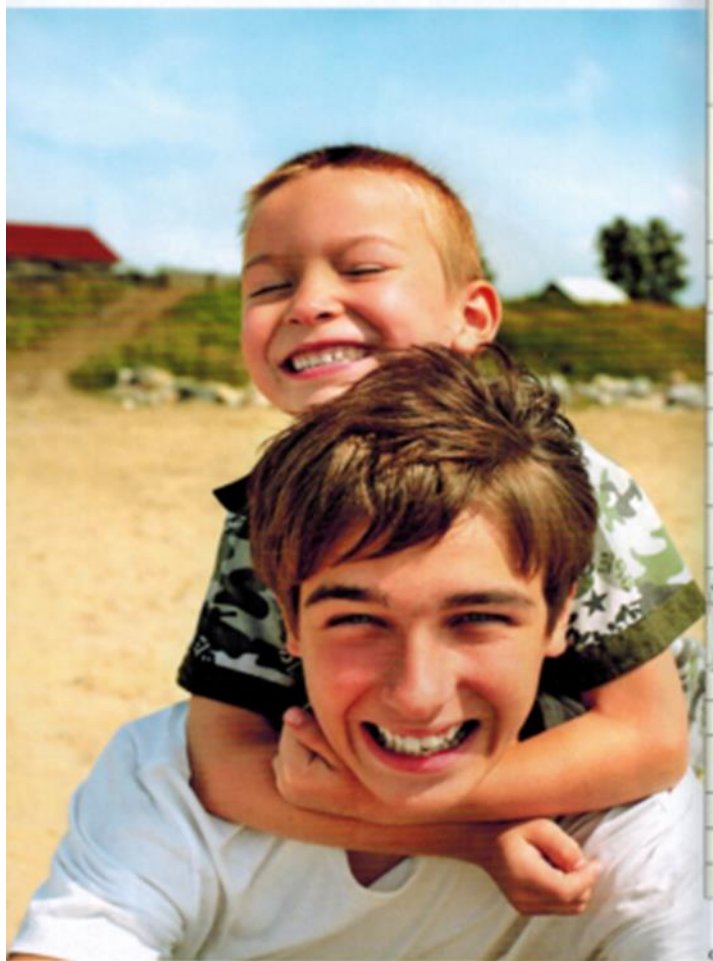
**Task 3:** What does a Libro Coach do?

## Welcome to Libro

Libro isn't your average financial institution in southwestern Ontario. At Libro, it's all about understanding what's important in your life so we can help you reach your personal prosperity goals, whatever prosperity means to you.

Libro doesn't make decisions based on stockholders whose interests lie elsewhere; that's because we're owned by our customers, we call them Owners, and make decisions based on their best interests. And we don't hide fees or create new fees that don't make sense. It's not who we are. Your needs always come first. Not ours.

Let's grow prosperity together.



## Personal Banking

Your banking should fit your lifestyle. That's why our chequing and savings accounts are as unique as your needs, designed to grow and change with you. Libro has the knowledge and expertise to tailor financial solutions that are right for you.

Your Libro Coach helps you connect all the dots and gain control of your money. A Coach is an expert who is accountable for helping you improve your financial well-being; supporting you, educating you, and inspiring entire families. We're passionate to do whatever it takes.

## Additional Services

Libro carries a full range of financial services, committed to making it easy and convenient for you to manage your everyday banking needs.

- Canada savings bonds
- Certified cheques
- Electronic funds transfer
- Estate planning
- Financial planning
- Foreign exchange
- Investments
- MasterCard®
- MeritLine retail line of credit
- Mutual funds\*
- Personal lending
- Safe deposit boxes
- Student Line
- Trust services
- Wealth management
- Wire transfers

\*Mutual funds are offered through Credential Asset Management Inc.



**Task Title: Your Banking Options – Welcome to Libro**

**Answer Key**

**Task 1:** List 5 Additional Services that Libro provides to its customers.

**A:** Any 5 of the 16 listed

**Task 2:** How does Libro make decisions?

**A:** they make decisions based on their owners (customers) best interests

**Task 3:** What does a Libro Coach do?

**A:** helps you connect the dots and gain control of your money



**Task Title: Your Banking Options – Welcome to Libro**

<b>Performance Descriptors</b>		<b>Needs Work</b>	<b>Completes task with support from practitioner</b>	<b>Completes task independently</b>
<b>A1.1</b>	<ul style="list-style-type: none"> <li>reads short texts to locate a single piece of information</li> </ul>			
<b>A1.2</b>	<ul style="list-style-type: none"> <li>scans text to locate information</li> </ul>			
	<ul style="list-style-type: none"> <li>locates multiple pieces of information in simple texts</li> </ul>			

**This task:** was successfully completed  needs to be tried again

<b>Learner Comments</b>

\_\_\_\_\_  
**Instructor (print)**

\_\_\_\_\_  
**Learner Signature**