

PART II: PERFORMANCE EVALUATION

RESULTS

Far Exceeded	Exceeded	Met	Not Some Not All	Did Not Meet
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Lee had done an outstanding job in far exceeding his sales goals. Timeplan: Booked \$643,673.00 which is 147% of goal. Real Estate: \$576,500.00 89.4% of goal and Lines of Credit: \$730,000.00 which is 695.2% of goal. The total dollar goal for year 1988 is \$1,192,000.00 total booked \$1,941,173.00 which is 161.4% of goal. Great Job!!!

X				
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Lee provides excellent customer service. However Lee must always take care of his loan customers and follow-up first, before he can be involved in New Accounts customers. He must learn to direct customers to the proper department in order to keep up with the fast paced environment of our branch.

	X			
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Lee follows policy and has incurred no losses due to bad judgment. Lee always collects the appropriate fees within his jurisdiction.

	X			
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DEVELOPMENTAL ACCOMPLISHMENTS

DO NOT RATE

UNPLANNED ACCOMPLISHMENTS

This PR is being written at this time to give Lee a much deserved merit increase in January 1989.

X				
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Lee won 2 days off from work through AMG #4056 for generating the most volume in accepting new applications for real estate loans.

Lee sent out mailings from branch to over 150 VIP customers in May. Lee met the branch Loan Goals by August 1988.. Received 2 letters from satisfied customers serviced by him at this branch. As of this date, loans in process total \$475,000.00.