



Five College Center for the Study of World Languages

### Conversation Preparation Guides

**Title: Banking Issues**

**Topic: Financial Matters**

**Level: Advanced**

### Practice on Your Own

Imagine you want to call your bank or go to the bank to take care of some business which may include making a payment, challenging a transaction, making a transfer...

- Think of the terms that are used in banking conversations such as bank account, account number, payment, transfer, mistake, savings account, checking account, credit card, debit card...
- Imagine different scenarios for which you come up with conversations, questions and answers.
  - *You:* Hello. This is Ashley Smith calling regarding my checking account.
  - *Bank Employee:* Hello. Can you confirm some information? Your date of birth, your bank account number, your address...
  - *You:* I have a question regarding a transaction on June 12<sup>th</sup>. I did not buy anything on that day, but...
  - *Bank Employee:* I see. Let me check on it for you. Please stay on the line...
- Think of a phone conversation to report the loss of your credit card. What should you do? When are you going to get your new card? What can you do in the meantime?
- Write an email or letter asking to close your bank account. You are not happy with the services. Write about your dissatisfactions.

### Practice in Conversation Session

- Discuss the banking system in the country/ies where the language is spoken. How is it different from the U.S. banking system?
- Role play calling the bank to challenge a transaction. You could also do this role play as a conversation in the bank instead of a phone call.
- Now make a phone call to report a lost or stolen credit card. What questions are you asked to confirm your identity? What are the steps? What should you do while you wait to receive your new card?

- Read the email or letter you have written asking to close your bank account. Focus on the reasons of dissatisfaction with the bank's services.