

Task-Based Activity: Filling out a bank account application

Laubach Connection: Laubach Way to Reading (LWR) Book 4, Lesson 11

OALCF Link

Relevant Goal Paths

Apprenticeship, Employment, Independence, Postsecondary

Rationale: Learners on the Apprenticeship, Employment, Independence, and Postsecondary Paths will need to fill out application forms for a variety of different reasons.

Task-Based Activity Description: The learner will interpret a simple document (profile) to locate information **(A2.2)** or they will use their own personal information. Using the personal information or information from the profile, the learner will complete a simple document **(B1.1)**.

Competency, Task Group and Level Indicators

(See Assessment page for performance descriptors)

A: Find and Use Information

A2: Interpret documents

- **A2.2:** Interpret simple documents to locate and connect information

B: Communicate Ideas and Information

B3: Complete and create documents

- **B3.2a:** Use layout to determine where to make entries in simple documents

Materials Required

- Pen or pencil and eraser
- Question sheets

Overview

Activity Introduction

This task uses a profile and a simple bank account application. Discuss with the learner if they have ever had to fill out an application for a bank account before. The learner will fill in the application using the information found in the profile or using their own personal information.

New words

Determine any new words that you think are being introduced in the activity and review those words with the learner.

Instructions

1. Have the learner fill in their name and the date.
2. Have the learner complete the pre self-assessment.
3. Have the learner complete the task-based activity.
4. After completing the activity, have the learner complete the post self-assessment.
5. After the learner has completed the task-based activity, complete the assessment section and review the results with the learner.

Extension activities

- Have the learner complete the form using their own information
- Have the learner bring in forms they need to complete

Task-Based Activity: Filling out a bank account application

Learner Name: _____ **Date:** _____

Pre self-assessment

I need to improve my skills at filling out simple applications:

Yes

No

Activity

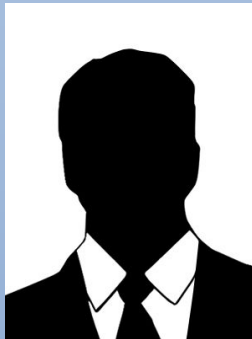
Please fill out the bank account application from below using one of the two options.

Option A: Use your own information to fill out the application.

OR

Option B: Fill out the form for Ralph Demeer using his profile below

Profile



Account Type:
Chequing/
Savings Account

Name: Ralph Jack Demeer
Title: Dr.
Occupation: Cardiologist
Place of work: Princeton Hospital
Date of birth: January 5, 1975

Home address (former): 13 Henry Street
Home address (current): 6 Lily Boulevard
City: Princeton
Province: British Columbia
Postal Code: T3K 7D2

Home Phone: (724) 556 9898
Cell Phone: (334) 778 8989
Business: (456) 338 9801 Ext. 556
When to call: PM
What number to call: cell phone

Email: deemer.RJ@gmail.com
Fax Number: 668- 894- 0293
Social Insurance Number:
140 895 6478

Additional People

Name: Lana Nicole Ringer
Title: Dr.
Occupation: Endocrinologist
Place of work: Princeton Hospital
Date of birth: June 26, 1977
Social Insurance Number: 140 890 456
Home information: Same as Dr. Deemer
Home Phone: Same as Dr. Deemer
Cell Phone: (334) 782 6735
Business: (456) 338 9801 Ext. 690
When to call: PM
What number to call: home phone
Email: ringer.LN@gmail.com
Fax Number: Same as Dr. Deemer

Dufferin Trust Bank

Personal Information

☐ Mr. ☐ Mrs. ☐ Miss ☐ Dr. ☐ Rev.

First Name

Middle Name

Last Name

Date of Birth (mm/dd/yy)

Social Insurance Number

Occupation or Type of Business

Home Address (current)

City/Province

Postal Code

Home Phone

Business Phone

Cell Phone

Best time to call: ☐ AM ☐ PM

Best number to call: ☐ Home ☐ Business ☐ Cell

Email Address

Fax Number

JOINT APPLICATION INFORMATION (IF APPLICABLE)

☐ Mr. ☐ Mrs. ☐ Miss ☐ Dr. ☐ Rev.

First Name

Middle Name

Last Name

Date of Birth (mm/dd/yy)

Social Insurance Number

Occupation or Type of Business

Home Address (current)
(if different from above)

City/Province

Postal Code

Home Phone
(if different from above)

Business Phone

Cell Phone

Best time to call: ☐ AM ☐ PM

Best number to call: ☐ Home ☐ Business ☐ Cell

Email Address (if different from above)

Fax Number (if different from above)

AUTHORIZATION

I state that the information provided is true and accurate. I have read, understand and accept the terms of the membership agreement provided to me. I consent Dufferin Trust Bank to collect, use and disclose my personal information for the purposes identified in the Dufferin Trust Bank privacy statement. I also consent to Dufferin Trust Bank obtaining credit information about me as it may require in connection to any accounts of loans for which I apply.

Applicant's Signature

Date

Joint Applicant's Signature(if applicable)

Date



Dufferin Trust Bank

Post self-assessment

I think my skills have improved as a result of completing this activity.

☐ Yes

☐ No

Learner comments:

Assessment

Task-Based Activity: Filling Out a Bank Application

Learner Name: _____ Date: _____

Practitioner Name: _____

Performance Descriptors	Needs Work	Improving	Excellent
A2.2: Interpret simple documents to locate and connect information <ul style="list-style-type: none">• performs limited searches using one or two search criteria• extracts information from tables and forms• uses layout to locate information• makes connections between parts of documents• makes low-level inferences• begins to identify sources and evaluate information B3.2a: Use layout to determine where to make entries in simple documents <ul style="list-style-type: none">• uses layout to determine where to make entries• begins to make some inferences to decide what information is needed, where and how to enter the information• makes entries using a limited range of vocabulary• follows instructions on documents			

The learner needs to work on the following:

This task was successfully completed

This task needs to be tried again

Practitioner Comments:

Learner Comments: