



# Pay on Death Accounts Hotspots (Webinar)

November 10, 2016 ☐ 8:30am - 9:00am

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A Pay On Death Account is a great way to leave money to beneficiaries without a long drawn out process of having to go through probate. There are a few hotspots we need to look out for in Louisiana when dealing with this type of account. In this webinar you will get valuable information on who the customer can leave his/her money to, what paperwork is needed and much more.

## What you will learn:

- Is a POD a will bypass?
  - Can the owner get more FDIC insurance?
  - Who can be the “named beneficiaries?”
  - What if there is more than one beneficiary, how are the funds disbursed?
  - What if one of the beneficiaries is deceased?
  - Are the rules for FDIC different than the Louisiana rules?
  - Do we have to have POD in the title?
  - What if there is more than one owner
  - FAQs on PODs
  - And much more
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## Who Should Attend

Customer service representatives, personal bankers, branch managers, tellers, head tellers, branch operations, and training.

## Webinar Speaker



**Christy Crawford** is president of Christy Crawford Compliance Consulting specializing in the education of banks and credit unions across the nation. Christy is an associate speaker for Gettechnical Inc. As a former trainer for Wal-Mart Corporation, and former V.P. of Gettechnical Inc. she brings her previous 11 years of sales and training experience to your financial institution. She earned a bachelor's degree from Louisiana State University and is BSA/AML certified. Her expertise is in the deposit side of the financial institution and focuses on teller, new accounts, IRAs, HSAs, robbery, security and BSA for the frontline training.