Handling Checks at Death of the Account Holder (Webinar)

May 23, 2018 □ 3:30pm - 5:00pm

When your account holder dies, there are usually many aspects of their life still outstanding. During this webinar we will look at the checks and all the questions you get asked every day. Insurance checks, treasury checks and regular checks, what are you supposed to do and what can you do to help the account holder and his or her family. What if there will be no official estate account? This webinar is a must for all who work the frontline.

What You Will Learn:

- How many days can I pay checks my customer wrote after death
- How to handle treasury checks after death
- What happens to customer's funds on social security representative payee accounts
- Who can negotiate a check after death made payable to the customer
- What documentation do we need to prove someone can act for decedent
- Can the spouse endorse checks for decedent
- Who can negotiate checks "To the Family of John Doe"
- And many other questions you get asked daily at the death of an account holder

Who Should Attend:

New Accounts representatives, Tellers, Trainers, Branch Managers, Personal Bankers, Deposit Operations and Branch Administration

Webinar Speaker:

Deborah Crawford is the President of gettechnical, inc. a Baton Rouge-based firm, specializing in the education of banks and credit unions across the nation. Her 27+ years of banking and teaching experience began at Hibernia National Bank in New Orleans. She graduated from Louisiana State University with both her bachelor's and master's degrees. Deborah's specialty is in the deposit side of the financial institution where she teaches seminars on regulations, documentation, insurance and Individual Retirement Accounts.

Webinar Registration:

Mr./Mrs./Ms. ____________________

Bank ____________________

Email Address ____________________

Branch Street Address ____________________

City, State, Zip ____________________

Phone ____________________

Fax ____________________

Payment Options:

☐ Check (Made payable to Louisiana Bankers Association)

☐ Visa ☐ MasterCard ☐ American Express

Card Number ____________________

Expiration Date __________ Amount to be charged: __________

Name on Card (please print) ____________________

Signature ____________________

Billing Address: ____________________

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Please check:

Registration Fees for LBA Members

☐ Live Webinar Connection	$165 per connection
☐ Webinar Recording	$165 per recording

Registration Fees for Non-Members

☐ Live Webinar Connection	$265 per connection
☐ Webinar Recording	$265 per recording

☐ This training will be covered under SBET (Small Business Employee Training Program). Please provide an email address on the line below to receive the necessary documentation for reimbursement:

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***Please Note: Recordings are not eligible for SBET funding**

Submit Registration and view rosters in the Education Section of the LBA's website, www.lba.org

Webinar access codes will be sent to registrants with confirmation emails one week prior to session.