



25 Vital Questions on Personal Accounts (Webinar)

June 24, 2019 ☐ 3:30pm - 5:00pm

Customers ask the most interesting questions about ownership of accounts, who will get the money when I die, can I add my niece to the account for two weeks, can I add POD during the term on a CD? This program will address 25 different questions your customers might ask on their personal accounts and will give the correct answers.

Program Topics:

- Rights at death on personal accounts
- Adding and deleting signers
- Adding and deleting owners
- Labels and special earmarking on accounts - good or bad
- Can you make ownership changes during the term of a CD
- What exactly can a POA do and not do
- Rights of joint owners
- Rights of authorized signers and agents
- POD designations and affidavits
- And many more questions and answers

Who Should Attend:

This webinar will benefit new accounts representatives, call service representatives, branch managers, assistant branch managers, branch administration, deposit operations, BSA CIP personnel, training and anyone who works with or manages the new account function.

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: _____

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:

***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.