



# Opening Fiduciary Accounts: POAs, Guardians, Estates, Trusts & More (Webinar)

April 20, 2020 ☐ 3:30pm - 5:00pm

Your account holder, the federal government or the court has named someone legally to act on his or her behalf. Now what? What can these caregivers and fiduciaries do? What supporting paperwork must each bring? During this webinar we will review the set-up, documentation and legal issues involved in these high risk accounts. You will learn how to style these accounts and get the signature card perfect every time.

## Program Topics:

- Different types of power of attorney documents
- What an attorney-in-fact can and can't do
- Adding an attorney-in-fact to an account
- When do POAs cease
- Guardianships—court ordered accounts and documentation
- Dos and Don'ts on guardianships
- How to set up guardianship accounts
- Estate Accounts: Letters Testamentary and Letters of Administration
- Answers to common questions on how to set-up and handle accounts at death
- Executors, Guardians, Powers of Attorney and other caregivers—authority, liability and paperwork
- Social security representative payee and veteran accounts
- Government benefit accounts' signature card set up
- CIP requirements on all fiduciary accounts

## Who Should Attend:

This informative session will be useful for new account representatives, customer service representatives, branch administration, branch operations, branch managers, personal bankers, compliance, BSA and anyone who opens new accounts.

## 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 \_\_\_\_\_  
Office Phone \_\_\_\_\_  
Cell \_\_\_\_\_

## 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:

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| <input type="checkbox"/> Live Webinar Connection | \$165 per connection |
| <input type="checkbox"/> Webinar Recording       | \$165 per recording  |

### Registration Fees for Non-Members

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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](http://www.lba.org)

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