



Social Security Representative Payee Accounts (Webinar)

July 11, 2016 ☐ 3:30pm - 5:00pm

Your institution opens accounts for social security representative payees. Are you setting them up right? Should you issue debit cards? What money can go in and out of these accounts? This important topic will be discussed in detail to help prevent your institution from making costly errors in the account opening process. This webinar is designed for new account representatives and their managers.

What you will learn:

- What is a representative payee?
- Can the account be joint? Can the representative payee order a debit card?
- Do these have to be savings accounts?
- What can the representative payee use the account for?
- If the representative payee gets money for more than one person, how is account set up?
- What if representative payee is a group home?
- What if representative payee dies or resigns?
- What happens if owner dies?
- Can we give balances to beneficiary?
- And many more questions and answers

Who Should Attend

This webinar will benefit tellers, 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.



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Registration Form

Please make copies of this form if more connections are needed.

Connection 1

Connection 2

Mr./Mrs./Ms. _____	Mr./Mrs./Ms. _____
Bank _____	Bank _____
Email Address _____	Email Address _____
Branch Street Address _____	Branch Street Address _____
City, State, Zip _____	City, State, Zip _____
Phone _____	Phone _____
Fax _____	Fax _____

Payment Options

- Check (Made payable to Louisiana Bankers Association)
- Visa MasterCard American Express

Card Number _____ Expiration Date _____

Name on Card (please print) _____ Signature _____

Billing Address: _____ Amount to be charged on card \$ _____

Registration Fee
 \$165 per connection, LBA members
 \$265 per connection, nonmembers

- I cannot participate in the live program.
 Please send me the recording.
- \$165 (LBA members)
 - \$265 (non-members)
- *Recording and materials will be emailed after the program

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**

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**Submit registration and view rosters in the
 Education Section of LBA's Website, www.lba.org.**

Agenda

3:30 p.m. Webinar Begins
 5:00 p.m. Webinar Adjourns

Louisiana Bankers Association
 5555 Bankers Avenue
 Baton Rouge, LA 70808
 225-387-3282
 Fax 225-343-3159

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