



Writing New Account Procedures (Webinar)

October 15, 2020 ☐ 10:00am - 11:30am

During this webinar, we will take the core document from deposit accounts documentation and set up a working document so that you can tailor your procedures into the framework we will provide. You will receive a “core document” in a word document that you can drop your individualized documents into and achieve one of the big goals. Many financial institutions have “standards” on opening all types of new accounts.

What You Will Learn:

- Review federal laws we have to cover in the opening of accounts
- Learn the different ownership types that we should set up sample signature cards and screen shots for
- You will receive a checklist for documents for every type of accounts
- How to set up a manual like this if you are in more than one state
- What questions should we ask and research for state law purposes
- You will receive a template to start the hard work and lots of guidance to help you in the process

Who Should Attend:

This webinar will benefit training, compliance, branch operations, customer service representatives and branch personnel who would be involved in developing a new accounts procedure manual.

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 _____
 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:

Registration Fees for LBA Members

- Live Webinar Connection \$165 per connection
- Webinar Recording \$165 per recording

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- Live Webinar Connection \$265 per connection
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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**

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

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