Mid-America Credit Union Association

Members & Trust Accounts

TELEPHONE – WEBINAR – AUDIO/VISUAL CD ROM

Wednesday, March 10, 2010

12:00 pm – 1:30 pm Pacific
1:00 pm – 2:30 pm Mountain
2:00 pm – 3:30 pm Central
3:00 pm – 4:30 pm Eastern

For your convenience, you may register online!

Register Now or Learn More About Your Registration Options – click here

If you prefer to mail or fax your registration, please use the link above and print the form.

Your member just went to an attorney and put all his or her assets into a living trust. He or she is now standing in front of you and wants you to update the account cards and make sure all assets are re-titled in the name of the trust. You look at the member service representative next to you and wish you had gone to lunch. But formal trusts, like business accounts, are not difficult if you understand what they are designed to accomplish; who the players are; and the due diligence issues. This webinar is designed give you the information you need to confidently open formal trusts in share accounts.

HIGHLIGHTS

- Living Trusts, Miller Trusts, Marital Trusts, Family Trusts
- Understanding the mechanics of a formal trust and what your member is trying to accomplish
- What is a trust agreement?
- Who are the players of a trust?
- Can a trust be a member of a credit union?
- What happens when grantors/trustees die?
- What about NCUSIF insurance and trusts?
- How to change existing accounts when a trust comes into play
- Can you have an authorized signers, agents or powers-of-attorney on a trust account?
- What is the difference between a formal trust and the informal trust or pay on death account?

WHY SHOULD YOU PARTICIPATE?

This session is a cost-effective way to train credit union staff on trust accounts. You may train as many individuals as you like for one set price. There will be no travel costs, no time lost from work, and no one will be required to leave the institution.

WHO SHOULD ATTEND?

This informative session is best suited to member service representatives, branch managers, branch administration, tellers, training staff, and all frontline staff who open accounts.

PLEASE NOTE: Your registration fee allows you to have one telephone connection. However, as many people as you like may listen from your office speaker phone. If you register for the webinar, your registration fee also includes one internet connection from a single computer terminal.

ABOUT THE PRESENTER – Deborah L. Crawford, gettechnical inc.
Deborah Crawford is the President of gettechnical inc., a Baton Rouge-based firm, specializing in the education of financial institutions across the nation. Her 20+ years of experience began at Hibernia National Bank in New Orleans. She graduated from Louisiana State University with both her bachelor's and master's degrees.

Debbie specializes in the education of financial institution employees and officers in the area of deposit account laws, new account documentation, insurance, complex compliance regulations and IRAs.

WHAT IS A WEBINAR?
This training method allows unlimited listeners on your office speaker phone. By choosing the webinar option, participants will also be able to view online visuals as the presentation is delivered. Registrants receive a toll-free number and pass code that will allow entrance to the seminar. The session will be approximately 90 minutes, including question and answer sessions. Seminar materials will be sent prior to the broadcast along with hookup instructions. Your pin number, hookup instructions and handouts will be emailed to you. You will need the most current version of Adobe Acrobat Reader available free at www.adobe.com.

CAN'T ATTEND THE SCHEDULED TRAINING? ORDER THE AUDIO/VISUAL CD ROM!
As an added benefit, you may purchase a CD Rom* of this presentation. The CD includes the original audio/visual presentation, the question and answer sessions, and the handouts. In addition, you will be able to contact the presenter if you have follow-up questions. Use this "off-the-shelf" training program for those that could not attend the live seminar and for future training. **AFFORDABLE, PROFESSIONAL TRAINING, WHEN AND WHERE YOU CHOOSE.**

*CD Rom for PC use only

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Questions? Email MACUA@CUwebtraining.com or call 406/442-2585.

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