



WEBINAR SCHEDULE 2020

Date	Time (Eastern)	Hours	Title	Presenter
January 8, 2020	11:00 AM	2	Interaction Training	Honey Shelton
January 10, 2020	11:00 AM	2	DIY Systems Selection	Charlie Kelly
January 14, 2020	2:30 PM	2	CRE Appraisals: Components, Approaches to Value & Cap Rates	Richard Hamm
January 14, 2020	11:00 AM	2	Compliance Management	David Dickinson
January 16, 2020	2:30PM	2	Opening Business Accounts	Deborah Crawford
January 16, 2020	11:00AM	2	Sexual Harassment and Respectful Workplace	Bob Gregg
January 22, 2020	2:30PM	2	IRA Update	Patrice Konarik
January 23, 2020	2:30 PM	2	Writing Teller Procedures and Training	Deborah Crawford
January 28, 2020	11:00 AM	2	Subpoenas	Terri Thomas
January 29, 2020	11:00AM	2	FTC Endorsement Guides	Jack Holzknacht
January 29, 2020	2:30PM	2	W-9 Deposit Accounts Set Up and Interest Reporting	Deborah Crawford
January 31, 2020	11:00AM	2	Health Savings Accounts	Patrice Konarik
February 5, 2020	2:30PM	2	Opening New Accounts Part I: Personal/Consumer Accounts	Suzie Jones
February 7, 2020	2:30 PM	2	BSA Annual Staff Training	Deborah Crawford
February 11, 2020	2:30PM	2	Online Account Opening	Deborah Crawford
February 12, 2020	2:30 PM	2	Opening New Accounts Part II: Business Accounts	Suzie Jones
February 13, 2020	2:30PM	2	Legal Issues on Deposit Accounts: From Birth to Death	Deborah Crawford
February 13, 2020	11:00AM	2	Setoff	Terri Thomas
February 14, 2020	11:00 AM	2	Call Report Updates	Ann Thomas
February 18, 2020	2:30 PM	2	CRE Appraisals: Regulations & the Review Process	Richard Hamm
February 18, 2020	11:00AM	1.5	10 Things to know Before Your Next Copre Negotiation	Charlie Kelly
February 19, 2020	2:30PM	2	Opening New Accounts Part III: Trust & Fiduciary	Suzie Jones
February 20, 2020	11:00 AM	2	ACH Rule Changes	Kate Cole
February 26, 2020	11:00AM	2	Advanced TRID Compliance	Jerod Moyer
February 26, 2020	2:30PM	2	Excel Explained: Minimize Spreadsheet Errors	David Ringstrom
February 27, 2020	2:30 PM	2	Garnishments	Terri Thomas
February 28, 2020	2:30 PM	2	Developing Teller Compliance Training	Deborah Crawford
March 3, 2020	11:00 AM	2	Protecting Your Salaried-Except Status	Bob Gregg
March 3, 2020	11:00 AM	2	Audit Report Writing	Philip Vassallo
March 11, 2020	2:30 PM	2	10 Hot BSA Exam Issues	Deborah Crawford
March 11, 2020	11:00 AM	2	ACH Origination	Kate Cole
March 12, 2020	2:30 PM	2	Staff Deposit Regulatory Training- Meeting Annual Requirements and More	Deborah Crawford
March 12, 2020	11:00 AM	2	IRA Death Distributions	Patrice Konarik
March 16, 2020	2:30 PM	2	Commercial Construction Lending	Richard Hamm
March 17, 2020	11:00 AM	2	Loan Denials & Other Adverse Notices	David Dickinson
March 17, 2020	2:30 PM	2	What to Do When a Customer Dies	Terri Thomas
March 18, 2020	11:00 AM	2	Check Fraud	Terri Thomas
March 19, 2020	2:30 PM	1.5	Tech Strategies	Charlie Kelly
March 23, 2020	2:30 PM	2	Residential Construction Lending	Richard Hamm
March 24, 2020	2:30 PM	2	CTR Line-by-Line	Deborah Crawford
March 26, 2020	2:30 PM	2	Mapping Multi-tiered Business Accounts	Deborah Crawford
March 27, 2020	11:00 AM	2	Call Report- Lending Schedules for Banks	Ann Thomas
April 2, 2020	11:00AM	2	Dealing with Casual Days, Dress Codes and Work Appearance	Bob Gregg
April 6, 2020	2:30PM	2	Commercial & Business Lending Basics for Support Personnel	Richard Hamm
April 7, 2020	11:00AM	2	Overdrafts	Jerod Moyer
April 8, 2020	11:00 AM	2	Excel Explained: Creating Interactive Spreadsheet	David Ringstrom
April 16, 2020	2:30 PM	2	SAR: Line by Line	Deborah Crawford
April 21, 2020	2:30PM	2	Signature Card Danger Zones	Deborah Crawford
April 22, 2020	2:30 PM	2	Teller Compliance Issues-Updated for Regulation CC Charges	Deborah Crawford
April 23, 2020	2:30 PM	2	CRE Lending: Cash Flow Analysis & Cap Rates	Richard Hamm
April 28, 2020	2:30PM	2	BSA: Customer Identification Program-Is it time to Update?	Deborah Crawford
April 29, 2020	2:30PM	2	Introduction to Banking for New Employees	Deborah Crawford
May 6, 2020	11:00AM	2	Fair Lending	Jerod Moyer
May 7, 2020	2:30PM	2	Writing BSA Procedures	Deborah Crawford
May 7, 2020	11:00AM	2	Bank Call Reports Preparation for Beginners- Part 1	Ann Thomas
May 8, 2020	11:00 AM	2	Intro to ACH	Kate Cole
May 14, 2020	2:30 PM	2	Deposit Regulation Update and Review	Deborah Crawford
May 14, 2020	11:00 AM	2	Bank Call Reports Preparation for Beginners- Part 2	Ann Thomas
May 15, 2020	11:00 AM	2	Call Reports: RC-C Loan Coding and Related RC-R Reporting	Ann Thomas
May 19, 2020	2:30 PM	2	Opening Fiduciary Accounts	Deborah Crawford
May 20, 2020	2:30 PM	2	Staff Training: Human Trafficking, Elder Fraud and Identity Theft	Deborah Crawford
May 21, 2020	2:30PM	2	BSA: MSBs, MRBs, TPPPs, NGOs and all the high-risk customers	Deborah Crawford
May 21, 2020	11:00AM	2	Bank Call Reports Preparation for Beginners- Part 3	Ann Thomas
May 28, 2020	11:00AM	2	Bank Call Reports Preparation for Beginners- Part 4	Ann Thomas
June 3, 2020	11:00AM	2	Power of Attorney	Terri Thomas
June 9, 2020	11:00AM	2	Trusts	Terri Thomas
June 10, 2020	2:30PM	2	Masterful Time Management	Philip Vassallo
June 11, 2020	11:00AM	2	Notary	Terri Thomas
June 15, 2020	2:30PM	2	CRE Lending: Property Types, Lease Structures & Other Non-Financial Risks	Richard Hamm
June 18, 2020	2:30PM	2	Excel Explained: Basic Pivot Tables	David Ringstrom
June 23, 2020	2:30PM	2	Auditing Your Signature Cards	Deborah Crawford
June 24, 2020	2:30PM	2	New BSA Officer Training	Deborah Crawford
June 25, 2020	2:30PM	2	Handling Deceased Accounts and Checks	Deborah Crawford
June 29, 2020	2:30PM	2	CRE Appraisals: Components, Approaches to Value & Cap Rates	Richard Hamm
July 7, 2020	11:00AM	2	Subpoenas	Terri Thomas
July 8, 2020	11:00AM	2	Escrows	David Dickinson

July 9, 2020	2:30PM	2	BSA: CIP and CDD Update	Deborah Crawford
July 14, 2020	2:30PM	2	Opening Accounts for Court-Ordered Accounts	Deborah Crawford
July 15, 2020	11:00AM	2	Customer Dies	Terri Thomas
July 16, 2020	2:30PM	2	Checks—Endorsements, Fraud and Compliance Issues	Deborah Crawford
July 22, 2020	2:30PM	2	25 Overdraft Privilege Issues and How to Avoid Them	Deborah Crawford
July 23, 2020	2:30PM	2	25 Questions Customers Ask About Business Accounts	Deborah Crawford
July 27, 2020	2:30PM	2	Credit Appraisals: Regulations & the Review Process	Richard Hamm
July 28, 2020	2:30PM	2	Opening Minor Accounts	Deborah Crawford
August 4, 2020	11:00AM	2	ACH Origination for Lenders	Kate Cole
August 5, 2020	2:30PM	2	Opening Accounts for Non-Profits, Charity, Benefit and Associations	Deborah Crawford
August 5, 2020	11:00AM	2	Advertising	David Dickinson
August 12, 2020	11:00AM	2	Auditing Your Anti-Harassment Policies and Process	Bob Gregg
August 13, 2020	11:00AM	2	Call Report – Lending Schedules for Banks	Ann Thomas
August 14, 2020	11:00AM	2	Excel Speed Tips	David Ringstrom
August 17, 2020	2:30PM	2	Strategic Loan Pricing	Richard Hamm
September 2, 2020	2:30PM	2	Excel: Automating Financial Statements	David Ringstrom
September 8, 2020	11:00AM	2	Garnishments	Terri Thomas
September 9, 2020	2:30PM	2	Audit Report Writing	Philip Vassallo
September 10, 2020	11:00AM	2	IRA: The Basics	Patrice Konarik
September 17, 2020	11:00AM	2	IRA: Rollovers vs. Transfers	Patrice Konarik
September 18, 2020	11:00AM	2	Call Report for Banks – Recent Changes, Highlights, and Pitfalls	Ann Thomas
September 21, 2020	2:30PM	2	Residential Construction Lending	Richard Hamm
September 22, 2020	11:00AM	2	TRID for Beginners	Jerod Moyer
September 23, 2020	1:30PM	2	Strategic Planning for Financial Institutions- Its All About Your Strategy	Kate Cole
September 24, 2020	11:00AM	2	Employment Records and How to Keep Them	Bob Gregg
September 25, 2020	11:00AM	2	Call Reports: RC-C Loan Coding and Related RC-C Reporting	Ann Thomas
September 28, 2020	2:30PM	2	Interaction Training	Honey Shelton
October 1, 2020	11:00AM	2	IRA: Distributions and Beneficiaries	Patrice Konarik
October 6, 2020	2:30PM	2	Interaction Training	Honey Shelton
October 7, 2020	11:00AM	2	ACH Audit & Risk Assessment	Kate Cole
October 15, 2020	2:30PM	2	Excel: Filtering and Slicing Data	David Ringstrom
October 20, 2020	11:00AM	2	Interaction Training	Honey Shelton
October 22, 2020	11:00AM	2	IRA: Auditing Compliance	Patrice Konarik
October 26, 2020	2:30PM	2	Commercial & Business Lending Basics for Support Personnel	Richard Hamm
October 29, 2020	11:00AM	2	Flood Insurance	Jerod Moyer
November 4, 2020	11:00AM	2	Excel Charts	David Ringstrom
November 9, 2020	2:30PM	2	CRE Lending: Cash Flow Analysis & Cap Rates	Richard Hamm
November 10, 2020	11:00AM	2	ATR, QM, HCM & HPML	Jerod Moyer
November 19, 2020	11:00AM	2	Check Fraud	Terri Thomas
November 19, 2020	2:30PM	2	Interaction Training	Honey Shelton
December 2, 2020	11:00AM	2	Power of Attorney	Terri Thomas
December 7, 2020	2:30PM	2	Commercial Construction Lending	Richard Hamm
December 8, 2020	11:00AM	2	Trusts	Terri Thomas
December 8, 2020	2:30PM	2	Excel 101: Introduction to Spreadsheets	David Ringstrom
December 9, 2020	11:00AM	2	EFT Disputes	David Dickinson
December 11, 2020	11:00AM	2	Interaction Training	Honey Shelton
December 17, 2020	11:00AM	2	Notary	Terri Thomas

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