

# Financial Privacy & GLBA Update: Including the New Model Privacy Notice Form

WEBINAR – ON DEMAND WEB LINK & FREE CD ROM

**Thursday, March 11, 2010**

12 - 1:30 pm PT

1 - 2:30 pm MT

2 - 3:30 pm CT

3 - 4:30 pm ET

Banks have traditionally safe-guarded their customers' financial information. Now under Gramm-Leach-Bliley Act (GLBA), banks must provide periodic notices to customers regarding the bank's information sharing practices and must inform customers of their right to opt-out. Recently, the FDIC and other federal agencies released a new model privacy notice form that is designed to make it easier for consumers to understand how financial institutions collect and share personal information.

Banks that provide this model privacy notice form to their customers will be in compliance with GLBA. However, the previous safe harbor provisions under GLBA will be eliminated on January 1, 2011. Therefore, to obtain a compliance safe harbor after January 1, 2011, your bank must use the new model privacy notice form. This webinar will review the new model privacy notice form, explain how the new form should be used, and cover all the financial privacy duties a bank owes to its customers.

**Continuing Education: Attendance verification for CE credits provided upon request.**



## HIGHLIGHTS

- Background on financial privacy rules
- Difference between GLBA and the Federal Right to Privacy Act
- Detailed review of new model privacy notice form
- Exceptions to the consumer's right to opt-out
- Limitations on sharing of consumer information
- Privacy concerns with third-party vendors

## WHO SHOULD ATTEND?

This informative session is designed for deposit operations personnel, loan operations staff, retail officers, commercial officers, attorneys, compliance officers, and managers.

**MEET THE PRESENTER**

**Elizabeth Fast, JD, CPA,  
Banker's Choice**



**[CLICK HERE TO LEARN MORE ABOUT YOUR REGISTRATION OPTIONS](#)**

# Community Bankers Association of Oklahoma REGISTRATION FORM

Date of Seminar	Name of Seminar	Live Webinar \$230	On-Demand Link & Free CD Rom \$230	Both Live Webinar & On-Demand Link (includes free CR Rom) \$350	TOTAL
					\$

**\*CD Rom for pc use only**

Name: \_\_\_\_\_ Bank: \_\_\_\_\_

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**Hook up instructions and seminar materials will be emailed approximately  
7 days prior to the seminar.**

**REGISTRATION AND PAYMENT INSTRUCTIONS – Please note invoices are not provided.  
Mail registration form and check made payable to:**

Financial Education and Development, Inc., P.O. Box 1780, Helena, MT 59624

**Fax registration form, including credit card number to (406) 442-2357.**

**Important Note if Paying by Credit Card:** This form will serve as your receipt. Charges will show up on your credit card statement from Financial Education and Development, Inc.

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**You can now register online!!! Go to**

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**\*NOTE:** It is best to have all payments and registrations to us 10 days prior to the seminar to ensure timely receipt of hook up instructions and handout materials. We will do our best to accommodate late registrations.

FOR QUESTIONS EMAIL: [CBAO@financialedinc.com](mailto:CBAO@financialedinc.com)

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