

Advanced New Account Issues: Powers-of-Attorney, Trusts, Estates & More

WEBINAR OR ON-DEMAND WEB LINK
(LINK INCLUDES FREE CD ROM)

Tuesday, October 4, 2011

12 - 1:30 pm PT
1 - 2:30 pm MT
2 - 3:30 pm CT
3 - 4:30 pm ET

If you have been in banking for a few years, you are far beyond the basics. This webinar will address complex issues when opening accounts, including trusts, estates, disregarded entities, powers-of-attorney, and more. Join us to learn the answers to many of the complicated questions customers pose. This session will also cover an array of new account opening questions on nonresident aliens, tax reporting, and multiple others. This is not a program for beginners. It is for experienced deposit account specialists.

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



HIGHLIGHTS

- How to set up and document a formal trust
- Key issues and problems with estate accounts
- Importance of “getting it right” on the signature card during account opening and what can happen when things go wrong
- Withholding agent responsibilities
- Whether non-resident aliens have to sign a W-8BEN
- Dealing with technical legal information without giving tax advice
- IOLTAs, agents, escrow accounts
- LLCs and tax reporting issues
- Disregarded entities
- Frequently asked questions

WHO SHOULD ATTEND?

This informative session is designed for experienced account representatives, senior new account representatives, personal bankers, branch managers, trainers, and customer service call centers.

MEET THE PRESENTER

**Deborah L. Crawford,
gettechnical inc**



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webinar listing page, and click on the link to register.**

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.**

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Mail registration form and check made payable to:**

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

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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

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