

# Association of Vermont Credit Unions

## Distance Learning Opportunities

January & February, 2010

*Session start time and educational investment are color coded as follows:*

11:00 start - One Hour QuickBite teleconference (Illinois CU League) - \$109 for unlimited listeners
11:00 start - Two Hour QuickBite teleconference (Illinois CU League) - \$159 for unlimited listeners
1:00 start - 90 Minute Webinar (Michigan CU League) - \$169 per Internet connection
3:00 start - 90 Minute Webcast (CU Web Training) - \$175 per Internet connection or CD-ROM, \$215 for both

<u>Date</u>	<u>Session Title</u>	<u>Presenter(s)</u>
<b>January</b>		
1/6	Dealing with Power of Attorney & Living Trust Documents	Elizabeth Fast
1/7	Interpreting Credit Reports for Sales Opportunities	Jeff Rendel
1/12	Reg CC	Ken Otsuka
1/13	Top 10 Reasons Your Member May Not Be Fully Insured by the NCUSIF	Deborah Crawford
1/14	Robbery Prevention & Response Strategies: The FBI Safecatch Model	Dana Turner
1/20	Mortgage Lending: Compliance & Safety / Soundness Requirements	Ann Brode
1/21	Creating ROI with Generations X and Y	Sarah Sladek
1/21	The Credit CARD Act of 2009	Todd Sherpy
1/26	Risky Business: Is Your Website Compliant?	Tony Arnett
1/27	New ACH Authorization & Return Rules Effective 3/19/10: Stop Payments, Reg. E & More	Shelly Simpson
<b>February</b>		
2/2	Sexual Harassment Training	Lynn Esp
2/3	Auditing for RESPA Compliance	Ann Brode
2/4	Teller Regulations	Honey Shelton Reed
2/9	Succession Planning	Dr. Michael Hudson
2/10	FACT Act	Todd Sherpy
2/10	Notary Essentials & Legalities	Ann Brode
2/11	Selling from the Drive-Thru & Teller Windows	Jeff Rendel
2/17	Reading & Understanding Personal Tax Returns: Schedules B, C & D	Tim Harrington
2/18	Reg. Z	Shelly Vils
2/23	Fair Lending	Steve VanSickler
2/23	Implementing FACT Act Accuracy & Integrity Rules: Deadline 7/1/10	Greg Souther
2/24	New Member Account Interview: Due Diligence & CIP	Deborah Crawford

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March & April, 2010

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<u>Date</u>	<u>Session Title</u>	<u>Presenter(s)</u>
<b>March</b>		
3/2	Improve Your Memory Forever	Jon Keith
3/3	Directors & the ALLL	Ann Brode
3/4	IRA	Christy Crawford
3/4	Bank Secrecy Act	Veronica Madsen
3/10	Call Center Lending Opportunities	Robert Israelite
3/10	Members & Trust Accounts	Deborah Crawford
3/16	Organic Growth at the Front-Line Level	Jeff Rendel
3/17	UBIT Issues	Kevin Fincher
3/17	Financial Privacy	
3/18	Regulatory Update	Veronica Madsen
3/24	Regulations D & E for Frontline Staff	Ann Brode
3/25	Achieving Sales Results with Your Team	Walt Zeglinski
3/25	RESPA / HMDA	Todd Sherpy
3/30	Understanding Minor Accounts	Carol Bertoux
3/31	Reading & Understanding Personal Tax Returns: Schedules E & F	Tim Harrington
<b>April</b>		
4/6	Conducting Credit and Background Checks	Lynn Esp
4/7	Financial Counseling for Loan Officers	Rick Menton
4/7	Understanding Signature Cards and Account Agreements	Deborah Crawford
4/14	Plastic Card Fraud	Ann Davidson
4/14	Lending to Small Businesses (Including SBA Loans)	Elizabeth Fast
4/20	Writing Policies for Loan Workouts & Collections	Ann Brode
4/21	Telephone Etiquette	Kelly Kettelboeter
4/21	Head Teller: Managing the Under-Performer	Bev Licata
4/22	Saving Money by Going Green (Earth Day)	Colleen & Jan Byrnes
4/28	How Your Member's Bankruptcy Filing Affects Your CU: Next Steps	Elizabeth Fast

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## Distance Learning Opportunities

May & June, 2010

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<u>Date</u>	<u>Session Title</u>	<u>Presenter(s)</u>
<b>May</b>		
5/5	Understanding Credit Union Financial Statements: For Directors & Volunteers	Tim Harrington
5/11	Supervising a Diverse Workforce	Sarah Armstrong
5/12	Strengthening Your Credit Union's Loan Review Program	Ann Brode
5/13	Teller Essentials	Honey Shelton Reed
5/19	Bank Secrecy Act	Rob Rutkowski
5/19	Handling Return Items: Checks / Share Drafts, Imaged, & ACH	Shelly Simpson
5/20	Reg CC - Funds Availability Made Easy	Rhonda Hudson
5/26	Repossession, Notice & Sale of Collateral on Personal Property	Elizabeth Fast
5/27	Credit Union Alternatives to Predatory Car Loans	William Myers
<b>June</b>		
6/2	Reg. E	Mary-Lou Heighes
6/2	Call Report Preparation & Filing	Robin Hoag
6/8	Bankruptcy	David Reed
6/9	Resolving the New Accounts Dilemma: Compliance & Security vs. Sales & Service	Deborah Crawford
6/10	Health Savings Accounts: A Credit Union Multi-Vitamin	Jim Fournier
6/15	TILA / Reg. Z / HELOC	Todd Sherpy
6/16	Cell Phones: Our Future Wallets	Steve Schaeffer
6/16	Safe Deposit Fundamentals	Dave McGuinn
6/17	Retaining Staff & Keeping Them Motivated During Tough Times	Becky McCrary
6/22	Professionalism in the Workplace	Mary Lynn Fayoumi
6/23	Preventing Losses on the Frontline & in the Call Center	Barry Thompson
6/29	Trust Accounts	Todd Sherpy
6/30	Key Financial Ratios Everyone and the Board of Directors Should Know	Carolyn Warden
6/30	Handling Right of Set Off: What You Need to Know	Elizabeth Fast