



Session details for **March 8 to 12 and 15 to 19**

**Event Code**

One Hour QuickBite telephone conferences \$109 per connection

Two Hour QuickBite telephone conferences \$159 per connection

90 Minute Webinars \$169 per Internet connection

90 Minute Webcasts \$175 per connection or CD-ROM, \$215 for both

**Training Opportunities - 4 Week Overview**

- 3/10 – Call Center Lending Opportunities
- 3/10 – Members & Trust Accounts
- 3/16 – Organic Growth at the Front-Line Level
- 3/17 – UBIT Issues
- 3/17 – Financial Privacy & GLBA Update: Including the New Model Privacy Forms
- 3/18 – Regulatory Update
- 3/24 – [Regulations D&E for Frontline Staff](#) (CUWT Webcast / CD)
- 3/25 – [Achieving Sales Results with Your Team](#) (ICUL QuickBite)
- 3/25 – [RESPA / HMDA](#) (MCUL Webinar)
- 3/30 – [Understanding Minor Accounts](#) (ICUL QuickBite)
- 3/31 – [Reading & Understanding Personal Tax Returns: Schedules E & F](#) (CUWT Webcast / CD)

**Click here to register for any of these sessions right now!**



**Please see the note at the bottom of this email for additional information about these events and our network providers**

**[Full Distance Learning Calendar for January through June](#)**

**Wednesday, March 10  
 11:00 – 12:00**

**Call Center Lending Opportunities**  
*Robert Israelite*

Increasing your loan portfolio continues to be a key strategic goal for credit unions everywhere. And in this day of tight margins, how can that be done in a cost-effective and member-friendly manner? Utilizing your existing call center can do just that.

In this audio conference, learn ways to take advantage of this member-facing channel and hear success stories of methods that have worked for other credit unions. If you need loans, this session is for you!

**SPEAKER - Robert Israelite** is a Services Product Specialist with CUNA Mutual Group. [Read more about this speaker](#)

**Wednesday, March 10  
 3:00 – 4:30**

**Members & Trust Accounts**  
*Deborah Crawford*

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.

		<p>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.</p> <p><b>SPEAKER – Deborah Crawford</b> is the President of gettechnical inc., where she 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.  <a href="#">Read more about this session and speaker</a></p>
<p><b>Tuesday, March 16 1:00 – 2:30</b></p>	<p><b>Organic Growth at the Front-Line Level</b></p> <p><b>Jeff Rendel</b></p>	<p>It is common knowledge that it is more economical and efficient to buy an existing business than to start a new one. The same common sense applies to developing new business with existing members.</p> <p>There is an excess of business to be gained from the members you see every day. Believe it or not, your members have financial business elsewhere, but they don't have to! Your frontline leaders can modify this dilemma and help your credit union grow. This webinar will help your credit union front-line staff identify and cultivate business opportunities through in-branch contact, phone conversations and member's referrals to others they know.</p> <p><b>SPEAKER: Jeff Rendel</b>, CSP is president of Rising Above Enterprises and works with financial service providers that want an engaged and committed workforce. <a href="#">Read more about this session and speaker</a></p>
<p><b>Wednesday, March 17 11:00 – 12:00</b></p>	<p><b>UBIT Issues</b></p> <p><b>Kevin Fincher</b></p>	<p>This session will cover the most recent UBIT issues impacting credit unions. Topics covered will include a discussion on how recent litigation matters will impact your reporting requirements, IRS audit update, best practice advice regarding the Form 990 information reporting and revisions to the 2009 form. Additionally, it will cover items that have been receiving increased scrutiny by IRS and state taxing jurisdictions. Examples include volunteer and employee taxable fringe benefits, lobbying and political involvement, and sales and use tax.</p> <p><b>SPEAKER: Kevin Fincher</b> is a Tax Partner in Clifton Gunderson LLP's Phoenix office and has more than twelve years of experience in public accounting dealing with a wide range of tax and industry topics relating to financial institutions. <a href="#">Read more about this speaker</a></p>
<p><b>Wednesday, March 17 3:00 – 4:30</b></p>	<p><b>Financial Privacy &amp; GLBA Update: Including the New Model Privacy Forms</b></p> <p><b>Elizabeth Fast</b></p>	<p>Credit unions have traditionally safe-guarded their members' financial information. Now under Gramm-Leach-Bliley Act (GLBA), credit unions must provide periodic notices to members regarding the credit union's information sharing practices and must inform members of their right to opt-out. Recently, the NCUA 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.</p> <p>Credit unions that provide this model privacy notice form to their members 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 credit union must use the new model privacy notice form. This webinar will review the new model privacy notice form, explain how the</p>

		<p>new form should be used, and cover all the financial privacy duties a credit union owes to its members.</p> <p><b>SPEAKER: Elizabeth Fast</b>, Esq. is a partner with Spencer Fane Britt &amp; Browne LLP where she specializes in the representation of financial institutions. <a href="#">Read more about this session and speaker</a></p>
<p><b>Thursday, March 18 1:00 – 2:30</b></p>	<p><b>Regulatory Update</b> <b>Veronica Madsen &amp; Tom Leduc</b></p>	<p>It can be challenging to keep up with current legislation and regulatory change that affects compliance issues at your credit union, but this bi-annual update is an ideal way to “check-in” on timely topics and have your questions answered.</p> <p>The timely areas to be discussed in this update session include Reg. E (ATM / Debit card transactions), Reg. GG (Internet Gambling effective June 1), FACT Act accuracy and integrity, Reg. CC (change-in-terms notices due March 26) and Reg. Z.</p> <p><b>SPEAKERS: Veronica Madsen</b> has been counsel for the Michigan Credit Union League and CUcorp since July 2005. <b>Tom Leduc</b> is a well known attorney and owner of The Leduc Group, LLC, in Dearborn, Michigan which specializes in financial institution regulatory compliance. <a href="#">Read more about this session and speaker</a></p>

### A note about our distance learning event types and network providers

**Illinois Credit Union League (ICUL) one and two hour QuickBites:** The \$109 or \$159 registration fee for these telephone conference calls includes digital handouts, one telephone connection for any number of listeners, and unlimited access for up to three weeks to an Internet archive recording of the live presentation.

**Credit Union Web Training (CUWT) 90 minute Webcasts:** The \$175 registration fee for these Internet-based presentations includes digital handouts, one Internet connection, and one telephone connection for any number of viewers / listeners. For the same \$175 fee, the complete recorded presentation of the live session and handouts may be ordered on CD-ROM and will be delivered within 10 business days after the event date. Both the live Webcast and the CD-ROM recording may be ordered for a total of \$215.

**Michigan Credit Union League (MCUL) Webinars:** The \$169 registration fee for these Internet-based presentations includes digital handouts, one Internet connection, and one telephone connection for any number of viewers / listeners. These are “live only” events and do not include any kind of post-event recording archive access or CD-ROM option.

**AVCU’s registration policy for distance learning events (QuickBites, Webinars & Webcasts):** Registration submissions [via our website](#) are preferred, but will also be accepted by email to [jcote@vcul.org](mailto:jcote@vcul.org). Please be sure to include the event title, cost, date, time, and contact person (if other than the email author) to ensure accuracy. Registrations by telephone are not accepted. Because we submit registrations to our third party network providers, we can only accept cancellations made within 24 hours of receipt of the registration. Invoices will be mailed (after the event) to the attention of the person submitting the registration unless otherwise requested. Unlikely occurrences such as a speaker cancellation or technical difficulties on the part of our network provider will be handled on a case-by-case basis in accordance with provider contractual agreements. AVCU and our providers stand behind and support the quality and value of our educational offerings.