

Regulations D & E for Frontline Staff

DISTANCE LEARNING

Wednesday, March 24, 2010 • 3:00 pm – 4:30 pm Eastern

Regulations D and E are the backbone of deposit accounts and member services. All frontline personnel must know and understand them well in order to ensure compliance and provide the best member service. This session will cover a broad array of topics from both regulations, as well as recent changes and prospective future changes.

HIGHLIGHTS

- Reg D – Who can have a NOW account? Examiners are looking closely at eligibility requirements.
- Reg D – What are the new changes regarding excessive withdrawals from savings accounts?
- Reg E – What is the most important information in a Reg E disclosure that can protect both your member and your credit union?
- Reg E – What are your credit union's responsibilities if there is an error?
- How do the examiners review these regulations?
- Review procedures and checklists for auditors!

ABOUT THE PRESENTER – Ann Brode, Brode Consulting Services, Inc.

Ann Brode began her career in 1973 and has continued her service as a consultant to regional and community financial institutions through a wide range of areas including strategic planning, lending, deposits, marketing, training, compliance, and management. Ann is a well-respected presenter and has spoken to audiences across the country for over 20 years. She has presented sessions for numerous state associations and has taught at the School of Banking Administration at the University of Wisconsin as well as many other state banking schools. Ann is the author of *The Bank Deposit Documentation Manual for Front-Line Personnel*, published by Bankers Publishing Company, and is well represented in numerous industry publications.

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March 24, 2010

Credit Union _____

Address: _____

Contact Person _____

Email Address _____

Phone _____ Fax _____

Format Ordered _____



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