

# Resolving the New Accounts Dilemma: Compliance & Security vs. Sales & Service

DISTANCE LEARNING

Wednesday, June 9, 2010 • 3:00 pm – 4:30 pm Eastern

**The goals are the same: to serve and protect our members!**

It may seem like an old battle: compliance and security versus sales and service. But it doesn't have to be one or the other, because the goals (to serve and protect our members) are the same! This webinar will examine our member goals and the compliance and security objectives. What security/compliance tasks must be accomplished for BSA, FACT Act, and other legal issues? How can those goals dovetail with our need to better serve, and sell to, our members? Take this opportunity to build your own new-account-interview hybrid and eliminate high-cost conflict in your credit union.

## HIGHLIGHTS

- A review of compliance tasks and security issues faced during a new account interview
- Understanding our sales objectives as a branch and a credit union
- Developing a hybrid-model new account interview to bring the best of both to the table
- What happens when our organization gets out of balance?
- Building a dynamic frontline and empowering the new account staff with skills to do what they do best

## ABOUT THE PRESENTER – Deborah L. Crawford, gettechnical inc.

Deborah Crawford is the President of gettechnical inc., a Baton Rouge-based firm, specializing in the education of financial institutions across the nation. Her 20+ years of experience began at Hibernia National Bank in New Orleans. She graduated from Louisiana State University with both her bachelor's and master's degrees. Debbie 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.

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## Resolving the New Accounts Dilemma

June 2, 2010

Credit Union \_\_\_\_\_

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Email Address \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_



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