



# 2023 EDUCATION & TRAINING VIRTUAL EVENT DESCRIPTIONS

## Virtual Lending School

- This is a two-day high impact interactive and informative event for credit union lenders. Day one is primarily focused on building a performing loan and maximizing cross-sales and ancillary sale and will cover a wide variety of topics. Day two is designed to cover the underwriting portion of the loan interview and will cover the three stages to every loan application, the sales effort, underwriting and processing.

## Branch Manager Training

- This two-day course is designed not only for managers new to their position but managers who may have held their position for a while and are needing fresh boost. Topics that will be covered include setting behavior and performance expectations, the benefits of engaged employees, how to identify branch pain points and so much more. You will also leave with a large toolbox of resources and have the opportunity to discuss specific issues you have come across and how to resolve them.

## Virtual IRA Workshop

- IRA essentials will be covered on day one giving attendees a solid foundation for IRA knowledge. Exercises are included throughout the day to help participants apply information to job-related situations. Attendees will leave this session able to work with IRA owners and process basic IRA transactions with confidence. This is a beginner's session; no previous IRA knowledge is assumed. Day two will cover advanced IRAs and will build on the attendees' basic IRA knowledge to address some of the more complex IRA issues that their financial organizations may handle. The instructor uses real-world exercises to help participants apply information to job-related situations.

## Virtual BSA Workshop

- Day one will cover the basics of BSA and is designed to meet the mandatory BSA training requirement under the regulation. Including BSA requirements for specific job functions such as tellers, member service and lenders. Day two you will hear from various speakers on hot topics facing credit unions currently. You will learn how what you do as someone who handles or is responsible for BSA at your organization makes a difference.

## Virtual Cybersecurity Summit

- This is a one-day event that will cover all or the top threats and trends affecting our credit unions today. There will be a variety of speakers and will feature a panel of cybersecurity experts who are currently in the field battling new threats as they arise, what they are seeing and what they are doing to stop it. There will be room for open dialogue during session.

## Virtual Crypto, Digital Currency & Defi

- Day one will cover the basic of crypto currency, how it applies to credit unions and how it could affect you in the future. Day two will go over the more advanced aspects of crypto currency and the factors that could change the way we incorporate it into traditional banking systems.