

CBA



Community Bankers
Association of Kansas

Personal Account Documentation & Signature Cards

WEBINAR OR ON-DEMAND WEB LINK
(LINK INCLUDES FREE CD ROM)

Tuesday, June 28, 2011

12 - 1:30 pm PT
1 - 2:30 pm MT
2 - 3:30 pm CT
3 - 4:30 pm ET

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Opening new accounts is more confusing than ever! Not only do new account representatives have to understand all the products, services, and accounts that your bank offers, they have to verify identities, provide the proper disclosures, and ensure the account contract or signature card is properly executed. How account ownership is documented is extremely important. This program will review the proper means of identification (using both documentary and non-documentary methods) to verify ownership. You will learn how the various forms of ownership are impacted by the death of an owner and what happens to power-of-attorney papers, PODs, or living wills.

Continuing Education: Attendance verification for CE credits provided upon request.



HIGHLIGHTS

- Customer Identification Program
- Various forms of ownership including single, joint with survivorship, joint without survivorship, trusts, PODs and many more
- FDIC Insurance – learn how different account ownership categories allow you to increase the amount of deposits your customer can have at your bank and remain fully insured
- What happens at the death of an owner?
- Handling requests for changes after the account is opened

WHO SHOULD ATTEND?

This informative session is designed for new account representatives, tellers, supervisors, trainers, and other staff charged with new deposit account duties.

MEET THE PRESENTER

**Bryan Fetty,
Young & Associates, Inc.**



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