



Advanced New Account Issues: Powers-of-Attorney, Trusts, Estates & More

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

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

[View Prices](#)

[Register Now!](#)

Tuesday, October 4, 2011

If you have been in banking for a few years, you are far beyond the basics. This webinar will address complex issues when opening accounts, including trusts, estates, disregarded entities, powers-of-attorney, and more. Join us to learn the answers to many of the complicated questions customers pose. This session will also cover an array of new account opening questions on nonresident aliens, tax reporting, and multiple others. This is not a program for beginners. It is for experienced deposit account specialists.

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



HIGHLIGHTS

- How to set up and document a formal trust
- Key issues and problems with estate accounts
- Importance of "getting it right" on the signature card during account opening and what can happen when things go wrong
- Withholding agent responsibilities
- Whether non-resident aliens have to sign a W-8BEN
- Dealing with technical legal information without giving tax advice
- IOLTAs, agents, escrow accounts
- LLCs and tax reporting issues
- Disregarded entities
- Frequently asked questions

WHO SHOULD ATTEND?

This informative session is designed for experienced account representatives, senior new account representatives, personal bankers, branch managers, trainers, and customer service call centers.

MEET THE PRESENTER

**Deborah L. Crawford,
gettechnical inc**



[CLICK HERE TO LEARN MORE ABOUT YOUR REGISTRATION OPTIONS](#)

**To view prices or register please return to the
webinar listing page, and click on the link to register.**