NJ EDGE

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Members & Trust Accounts

TELEPHONE – WEBINAR – AUDIO/VISUAL CD ROM

Wednesday, March 10, 2010

3:00 pm – 4:30 pm EST

Your member just went to an attorney and put all his or her assets into a living trust. He or she is now standing in front of you and wants you to update the account cards and make sure all assets are re-titled in the name of the trust. You look at the member service representative next to you and wish you had gone to lunch. But formal trusts, like business accounts, are not difficult if you understand what they are designed to accomplish; who the players are; and the due diligence issues. This webinar is designed give you the information you need to confidently open formal trusts in share accounts.

HIGHLIGHTS

- Living Trusts, Miller Trusts, Marital Trusts, Family Trusts
- Understanding the mechanics of a formal trust and what your member is trying to accomplish
- What is a trust agreement?
- Who are the players of a trust?
- Can a trust be a member of a credit union?
- What happens when grantors/trustees die?
- What about NCUSIF insurance and trusts?
- How to change existing accounts when a trust comes into play
- Can you have an authorized signers, agents or powers-of-attorney on a trust account?
- What is the difference between a formal trust and the informal trust or pay on death account?

WHY SHOULD YOU PARTICIPATE?

This session is a cost-effective way to train credit union staff on trust accounts. You may train as many individuals as you like for one set price. There will be no travel costs, no time lost from work, and no one will be required to leave the institution.

WHO SHOULD ATTEND?

This informative session is best suited to member service representatives, branch managers, branch administration, tellers, training staff, and all frontline staff who open accounts.

PLEASE NOTE: Your registration fee allows you to have one telephone connection and one internet connection. However, as many people as you like may listen from your office speaker phone or view from a single computer terminal.

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.

WHAT IS A WEBINAR?
This training method allows unlimited listeners on your office speaker phone. By choosing the webinar option, participants will also be able to view online visuals as the presentation is delivered. Registrants receive a toll-free number and pass code that will allow entrance to the seminar. The session will be approximately 90 minutes, including question and answer sessions. Seminar materials will be sent prior to the broadcast along with hookup instructions. Your pin number, hookup instructions and handouts will be emailed to you. You will need the most current version of Adobe Acrobat Reader available free at www.adobe.com.

CAN'T ATTEND THE SCHEDULED TRAINING? ORDER THE AUDIO/VISUAL CD ROM!
As an added benefit, you may purchase a CD Rom* of this presentation. The CD includes the original audio/visual presentation, the question and answer sessions, and the handouts. In addition, you will be able to contact the presenter if you have follow-up questions. Use this "off-the-shelf" training program for those that could not attend the live seminar and for future training. **AFFORDABLE, PROFESSIONAL TRAINING, WHEN AND WHERE YOU CHOOSE.**

*CD Rom for PC use only

Investment: $199.00 Webinar per connection
$199.00 CD Only
$249.00 CD & Webinar per connection

To enroll, you may complete and fax our **General Registration Form** (found on the Web site) or **send an Email to mzelinsky@njcul.org.** Please include Participant Name, Investment Choice and Cost to your credit union.

If you have any additional questions, please do not hesitate to contact the Education and Training Department at 609-448-2426 x100.