



TNBankers.org

Loan Assistants and Loan Processors Workshop

Developing
Tomorrow's
Lenders
Today

May 23, 2018 – Nashville
TBA Barrett Training Center

Loan Assistants and Loan Processors Workshop

Seminar Overview

This seminar is designed to increase the lending knowledge and administrative effectiveness of one of the most important positions in a community bank's lending staff—the loan assistant/loan processor. All the objectives of this program are intended to increase the productivity of individuals in these positions.

Who Should Attend

Loan assistants and loan processors, credit administration supervisors, and other members of the bank's loan support staff with credit administration responsibilities.

Program Content and Delivery

This live, overview program will address the topics of compliance issues and how compliance has and will continue to impact our state banks. Each participant will receive reference materials with vital information participants can use ongoing. The instructor will take time to discuss and answer participants' questions and will provide important information concerning the day's topics.

Discussion Topics

These topics address two items, given the applicant's loan request:

1. The specific required loan documentation
2. The mandatory items to consider under "fair lending" compliance

- The loan assistant's primary role in loan origination and bank profitability
- The loan assistant's role in developing and maintaining effective, working partnerships with lenders
- The loan assistant's role in compliance with federal lending regulations, including a discussion on the Truth-in-Lending/RESPA disclosures
- A review of the primary loan documentation for consumer, residential, and small business loans
- A variety of lending resources to expand the lending knowledge of loan assistants

Lending resources will include:

- Lending risk management and regulatory websites
- Sample loan documentation
- Sample loan policy narrative
- Sample credit administration guidelines
- Sample loan underwriting guidelines and documentation procedures
- Sample loan closing checklists
- Sample post-closing loan review format



Loan Assistants and Loan Processors Workshop

Presenter



John Cochran

In his banking career which spans over 35 years, John Cochran has served in various lending and senior management positions. He established Cochran Associates LLC in 2000 to provide bank training and consulting services.

To date, Cochran has presented lending seminars for many state bankers associations. He annually participates in several commercial lending schools as a principal instructor or sole presenter. He is also a member of the Pacific Coast Banking School where he presents a series of lectures on the topic of credit risk management.

Continuing Education Credit



Attendees qualify for 6.5 hours of Continuing Professional Education (CPE) credit in the area of Specialized Knowledge.



This program has not been pre-approved for ICB CE credits. Attendees who require ICB credits should go to aba.com/Training/ICB/Pages/default.aspx for further instructions.

Additional Information

No advance preparation or prerequisites required

Visit TNBankers.org/education/events for information on attire, special needs, cancellation policy, inclement weather policy, continuing education credit information, photo policy, and antitrust policy.

Date & Location

May 23, 2018 – Nashville
TBA Barrett Training Center
211 Athens Way, Nashville, 37228
615-244-4871 or 800-964-5525



This meeting location is a designated nonsmoking facility and property.

Schedule

8:30 a.m.	Registration
9:00 a.m.	Program begins
Noon	Lunch
1:00 p.m.	Program resumes
4:00 p.m.	Adjourn

Program Fees

TBA Members / Associate Members	Nonmembers	
Early Registration	\$255	\$510
Early registration deadline is May 9, 2018.		
Registration	\$305	\$560
Day-of-Program	\$355	\$610

Fee covers instruction, reference materials, refreshment breaks, and lunch. Please register early. The TBA office must receive early registrations by close of business on **May 9**. **Day-of-program registrations will include an additional \$50 late registration fee – no exceptions!** No written confirmation of seminar registration will be sent from the TBA. Participation in TBA programs is limited to members, associate members, and nonmembers from an eligible membership category at applicable member or nonmember rates.

Hotel Information

NASHVILLE

SpringHill Suites Marriott Nashville MetroCenter*
250 Athens Way
615-244-5474

Offers TBA corporate rate of \$161 based on availability

NEW! Fairfield Inn & Suites*

100 French Landing Dr
615-432-4677

Offers TBA corporate rate of \$139 based on availability

NEW! Candlewood Suites Nashville Metrocenter*

270 Venture Circle
Phone: 615-787-8787

Offers TBA corporate rate of \$129 based on availability

Hampton Inn & Suites Elliston Place

2330 Elliston Place
615-320-6060

Hampton Inn Vanderbilt

1919 West End Avenue
615-329-1144

Millennium Maxwell House Nashville*

2025 Rosa L Parks Blvd
615-259-4343

*Closest to TBA Barrett Training Center

TBA Contact

Monique Jenkins

Education Coordinator

mjenkins@TNBankers.org

615-244-4871 or 800-964-5525

www.TNBankers.org



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May 23, 2018 – Nashville, TBA Barrett Training Center

Please print or type.

1. Name _____ Nickname _____ SS# _____
 Title _____
 Email _____

Include last 4 digits for educational tracking

2. Name _____ Nickname _____ SS# _____
 Title _____
 Email _____

Include last 4 digits for educational tracking

Company _____

Address _____

City _____ State _____ Zip _____

Contact _____

Phone _____ Email _____

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2 WAYS TO REGISTER!

1. Register online at www.TNBankers.org with a credit card or ACH.
2. Mail this form along with a check to the address below.

Check Payment
Make checks payable to Tennessee Bankers Association

Check Number: _____ Check Amount: _____

RETURN COMPLETED FORM AND PAYMENT TO:

Tennessee Bankers Association
 ATTN: Monique Jenkins
 211 Athens Way, Ste 100 • Nashville, TN 37228-1381
 Phone: 615-244-4871 or 800-964-5525 Fax: 615-324-1990