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MINNESOTA CHAPTER

Commercial Lending Toolkit

Build a Better Toolbox to Get Better Results

Tuesday, April 6th at Sunrise Banks (8:30am - 4:00pm)

Commercial lending is full of moving parts! From memos and checklists to emails, covenants, and municipal approvals, missing just one detail can delay closings, frustrate borrowers, or create unnecessary risk. This course equips you with practical tools, templates, and strategies you can use immediately to strengthen your lending process and outcomes.

WHO SHOULD ATTEND? This course is designed for loan operations teams, those newer to commercial lending, or as a refresher for experienced individuals, including:

- Loan operations.
- Commercial lenders and relationship managers.
- Credit analysts and underwriters.
- Lending specialists and assistants.
- Risk management and compliance.
- Portfolio Managers.

Participants should have a basic understanding of lending terms and processes.

COURSE COVERAGE:

- Use opportunity memos to build buy-in and consistency.
- Apply loan checklists for timely, compliant closings.
- Write emails that get results with strategies to improve clarity and impact.
- Understand and manage financial ticklers for smoother document collection.
- Gain clarity on title insurance endorsements and what they really mean.
- Structure loan covenants and understand default resolution strategies.
- Navigate the municipal approval process (zoning, platting, permits, escrow, letters of credit).
- Broaden perspective with The Big Picture: operational, credit, and enterprise risk, and the three lines of defense model.
- Take home templates and tools ready to implement immediately



This course is approved for 6 hours of CRC Continuing Education Credits

Presented by: Clint Hooppaw - Founder of Highpoint Advisors LLC and a seasoned banking executive with three decades of credit and lending leadership experience. Clint has led teams through growth cycles, credit challenges, and strategic shifts. Known for his practical approach and engaging style, he equips banking professionals to manage conflict, collaborate effectively, and make sound credit decisions. **HERE is Clint's full bio.**

NOTE: If this course does not reach minimum attendance, the event will be cancelled and a full refund issued.

REGISTRATION FEE: (Includes a boxed lunch, bottled water)

- MN Chapter Affiliates - $315
- Non-Affiliates/Guests - $395

REGISTER HERE!

PLEASE NOTE: If this course does not reach the required minimum attendance, the event will be cancelled and a full refund issued.

Cancellations received after April 29th and no-shows won't receive a refund.

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