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MINNESOTA CHAPTER

Unlocking Successful Credit Presentations

Tuesday, March 2nd at Sunrise Banks (8:30am - 4:00pm)

The credit presentation is crucial in any loan file, creating first impressions and providing key information for approvers and examiners. The "Unlocking Successful Credit Presentations" course equips you with the tools and knowledge to prepare complete, concise, and fact-based credit presentations, enhancing the professional presence of lenders, analysts, and financial institutions.

WHO SHOULD ATTEND? This course will benefit credit analysts, underwriters, credit officers, approvers, lenders, sales managers, and loan committee members.

Participants are recommended to have a working knowledge of business lending, analysis and loan documentation. They should also have some experience with writing or utilizing loan presentations.

COURSE COVERAGE:

- Assess loan requests based on complexity, risk, and purpose.
- Communicate purpose, strengths, weaknesses, risks, and mitigants effectively.
- Avoid misused phrases, confusing terms, and biased writing.
- Articulate the story behind the numbers for executive audiences.
- Anticipate questions and provide proactive answers.
- Present a professional image through your writing.

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



Presenter: Clint Hooppaw is the founder of Highpoint Advisors, a consulting and training firm dedicated to building effective skills and confidence in the lending and credit industry. With nearly three decades of experience in banks, credit unions, and mortgage companies, Clint brings a unique perspective shaped by leadership roles in sales, operations, and senior credit management.
Click HERE for Clint's full bio.

Sunrise Bank Headquarters: 2525 Wabash Ave, St Paul, MN 55114

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 February 22nd and no shows won't receive a refund.

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