



Louisiana
Credit Union League

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LCUL'S 2020 EDUCATION CALENDAR



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CONFERENCES, SCHOOLS, WORKSHOPS

Programs will be added throughout the year as new topics of importance emerge to the forefront. Look for updates in LCUL's e-newsletters!



Brunch/Lunch and Learn with Jeff Rendel & Committee Conference	January 16	Lafayette, LA
Understanding & Articulating Key Ratios with Tim Gardner	February 11	Baton Rouge, LA
CUNA GAC	February 23-27	Washington, D.C.
Asset Roundtables	March 12	Baton Rouge, LA
CU Connect	March 13	Baton Rouge, LA
BSA Officer Training	March 20	Baton Rouge, LA
Louisiana GAC	April 14-15	Baton Rouge, LA
YPN Conference	April 22-23	Lafayette, LA
CUNA Board Certification School	May 4-8	New Orleans, LA
Ublend Academy by CUNA Mutual	May 19-20	TBA
Southeast Regional Credit Union Management School (SRCUS)	June 5-12	Athens, GA
Louisiana / Mississippi Volunteer Conference	June 17-20	New Orleans, LA
Southeast Regional Director's Conference	July 26-29	Point Clear, AL
LCUL Annual Meeting & Convention	August 5-8	New Orleans, LA
Marketing and Business Development Conference	September	TBA
New Laws and Compliance Conference	October	Lake Charles, LA
FiCEP: Next Steps	November	TBA



ADDITIONAL COLLABORATIVE EVENTS IN 2020:

Call Center Conference
Human Resources Workshop
Leadership/Coaching
Mortgage Lending Training
Security Workshop

"Tim Gardner was very engaging and seems to have a peculiar talent for ratios. His enthusiasm implies he has a craving to help one discover the art of ratios. He teaches as if everybody is capable of learning ratios with the greatest act of optimism." – Derrick Chambliss, Centric, FCU

*Dates/details of programs subject to change



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IS THERE ONLINE LEARNING?

AUDIT & ACCOUNTING

Accounting Nightmares: TDRs, Foreclosed Assets, & More
Call Report Advanced Lending Schedules
Call Report Fundamentals for New Preparers & Reviewers
Dissecting Loan Loss Reserves, Including CECL Expectations

COLLECTIONS

20 Common Mistakes in Consumer Collections
SBA Loans: Critical Steps in Protecting the SBA Guaranty
Collections & Right of Set Off in Commercial Lending
Consumer Bankruptcy: Compliance, Cramdowns & More
Credit Reporting & Delinquent Accounts: Disputes, Guidance
Maximizing Recoveries on Charged-Off Loans

COMPLIANCE

Avoiding BSA Compliance Violations
Beneficial Ownership Rules for Business Accounts & Loans
BSA High-Risk Members: Identifying, Due Diligence & Monitoring
Fair Lending File Review That Meets Regulator Expectations
FCRA Compliance: From Delinquent Loans to New Hires
Leveraging BSA Controls for More Effective OFAC Compliance
A Year in the Life of a Compliance Officer: Tips, Tools, Techniques
Advanced BSA Training: Risk, Compliance & Real-Life Scenarios
Risk Management Officer: Expectations & Responsibilities
Updating Your CDD Program

DIRECTORS

Board Secretary Training: Documenting Training, Minutes, & More
Boards Behaving Badly: Handling Unruly Directors
Building the Best Possible Board Meeting
Governance for Volunteers
Regulatory Requirements for Board: A Comprehensive Checklist
Understanding Marijuana Business Compliance for the Board
Frontline & New Accounts
Annual Training for the Branch: BSA, Identity Theft & Regs
10 Overdraft Hotspots, Including Regulations, Lawsuits, Guidance
Advanced New Account Issues: POAs, Trusts, Estates & More
Banking Cannabis Businesses: Hemp, CBD, THC & More
Compliance at Account Opening
Using Notary & Corporate Seals Accurately

HUMAN RESOURCES

Effective & Compliant Pre-Employment Background Checks
Harassment Claims in a #MeToo World
HR Compliance: Lessons Learned from Massive HR Failures
Incorporating Diversity & Inclusion into Your HR Policies
Recruiting & Retaining Millennials, Gen Z & Nexters

Can't get away for training? Our webinars offer high-quality training opportunities without the added expense and inconvenience of off-site travel. For a full description, visit www.lcul.com.

CU Webinar Network publishing dates/times soon!

IRA

2020 IRA & HSA Update
Advanced IRA Beneficiary Issues
Establishing & Amending Traditional & Roth IRAs
Fundamentals of IRA Beneficiary Designations & Distributions
Year-End Actions for IRA Administrators

INFORMATION TECHNOLOGY

Building & Sustaining a Cyber Intelligence Unit (CIU)
Cybersecurity Assessment Tool 2.0 & GLBA Privacy
GLBA Expectations, Internal Controls & the Human Factor
Layered Cybersecurity: Finding the Best Strategy for You
Data-Driven Loan Pricing

LENDING

Annual Loan Review: Consumer, Commercial & Residential
Appraisal Compliance Checklist, New Threshold Limits
Costly Mistakes in Calculating Debt Service Coverage
Avoiding Loan Denial Mistakes
Banking & Lending to Cannabis Businesses: Lessons Learned
Analyzing Commercial Tax Returns
Commercial Flood Insurance Rules & Best Practices
Commercial Loan Documentation
Commercial Loan Workouts, Restructuring & Loss Mitigation
Commercial Loans Secured by Real Estate
Managing a Commercial Construction Loan: Start to Finish
Common HMDA Violations & Challenges
Completing the TRID Closing Disclosure Line-by-Line
Completing the TRID Loan Estimate Line-by-Line
Consumer Loan Flood Insurance Forms Line-by-Line
Consumer Loan Underwriting Fundamentals
E-SIGN for Lenders: Technicalities, Expectations & Risk
HELOC: Disclosures, Documentation, Advertising, Amending
HMDA: Still a Four-Letter Word?
Lending to Hemp Businesses
Lending to Self-Employed Borrowers
Managing In-House Real Estate Evaluations
Qualifying Borrowers Using Personal Tax Returns
Regulator Update for the Credit Analyst
SAFE Act Compliance for Mortgage Loan Originators (MLOs)
TDRs: Defining, Examples, Financial Reporting, Best Practices
Top 10 Consumer Loan Documentation Mistakes
Top 10 Issues for the 2019 HMDA Report: Due March 1, 2020
UCC Article 9: Perfection Pitfalls & Proper Enforcement
UCC-1 & UCC-3 Financing Statements Line-by-Line
Writing Credit Memos & Loan Narratives with Confidence

MARKETING



Advertising Compliance Part 1: Print, Radio & TV
Advertising Compliance Part 2: Website, Online, Social Media
Attracting Millennials: The Next Generation of Revenue
Digital Marketing Strategies: What's Working in 2020?
Driving Engagement with Facebook, Twitter & Instagram

SECURITY & FRAUD



Fraud by Channel Type: Check, Debit, Credit, ACH & Wire
New Technology: Cash Recyclers, Pod Banking, Interactive ATMs
Risk Officer Series: The 15 Worst Security Mistakes
Robbery: Critical Steps Before, During & After

SENIOR MANAGEMENT



Branch Manager Guide to Success
Cutting-Edge Consumer Payments: Beyond PayPal & Venmo
Growth & Transformation Series: Leveraging LinkedIn for Lenders
Managing Vendors: Due Diligence, Contracts, Tips & Tools
Three Key Risk Assessments in Enterprise Risk Management
Using the FPR to Improve Credit Union Performance

OPERATIONS



10 Lessons Learned When a Borrower or Depositor Dies
2020 ACH Rules Update: Emerging & Real-Time Payments
ACH Tax Refunds: Exceptions, Posting & Liabilities
Action Plan for Reg CC Rule Changes Effective July 1, 2020
Advanced CTR Training: Beyond the "Textbook"
Advanced Issues in Dormant Accounts, Unclaimed Property
Comparing Regulation E with Visa & Mastercard Rules
Compliance with E-SIGN, E-Statements & E-Disclosures
Debit & Prepaid Card Compliance: Disclosures, Fee Changes
Deposit Operations Update 2020
Documents: What to Keep, Destroy, & What Holds Up in Court
FFIEC Requirements: Remote Deposit Capture Risk Assessment
Handling ACH Exceptions & Returns
Handling Consumer Complaints & Disputes
Impact of Reg CC Changes on ACH, RDC: Effective July 1
IRS Reporting Essentials: Form 1099 & Beyond
Legally Handling ATM, Debit Card Claims Under Regulation E
Liability with ACH Death Notification Entries & Reclamations
Managing Force-Placed Mortgage & Auto Insurance
Mastering Escrow: Analysis, Rules, Forms & Compliance
Recent Reg CC Changes: Lessons Learned & Future Outlook
Responding to Garnishment & Levy Demands
Visa Claims Resolution for Chargebacks



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CAN I BUY A WEBINAR SERIES?

Six Part Series

Get 6 for the price of 5!

DEPOSIT ACCOUNT SERIES:

1/15/20: Compliance at Account Opening
1/30/20: UCC 3 & 4 Check Issues:
2/18/20: Banking Cannabis Businesses: Hemp, CBD, THC & More
2/25/20: Deposit Operations Update 2020
3/25/20: Advanced New Account Issues: POAs, Trusts, Estates
4/8/20: 10 Overdraft Hotspots, Regulations, Lawsuits & Guidance

COMMERCIAL LENDING SERIES

2/12/20: Commercial Loan Documentation
3/3/20: Managing a Commercial Construction Loan: Start to Finish
3/26/20: Commercial Flood Insurance Rules & Best Practices
4/2/20: Commercial Loan Workouts, Restructuring & Loss Mitigation
4/29/20: Commercial Loans Secured by Real Estate
5/13/20: Analyzing Commercial Tax Returns

Four Part Series

Save \$80!

GROWTH & TRANSFORMATION SERIES

5/28/20: Driving Engagement with Social Media
6/30/20: Digital Marketing Strategies: What's Working in 2020?
7/15/20: Attracting Millennials: The Next Generation of Revenue
8/11/20: Leveraging LinkedIn for Lenders

CYBER SERIES

8/12/20: Layered Cybersecurity: Finding the Best Strategy for You
9/10/20: Cybersecurity Assessment Tool 2.0 & GLBA Privacy
10/15/20: GLBA Security Expectations, Internal Controls
10/29/20: Building & Sustaining a Cyber Intelligence Unit (CIU)

RISK OFFICER SERIES

8/20/20: The 15 Worst Security Mistakes
10/6/20: A Year in the Life of a Compliance Officer
10/28/20: Advanced BSA Officer Training: Real-Life Scenarios
11/18/20: Risk Management Officer: Expectations & Responsibilities



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ENHANCED TRAININGS



Louisiana Credit Union League

"There's a significant gap in the credit union space: proactive education supported by a pragmatic curriculum. We are confident this new program will align with the credit union's desire to enhance their volunteers' level of engagement.

- Ancin Cooley, CEO Synergy CU Consulting, Inc.

Supervisory Committee Certification



The Louisiana Credit Union League and Synergy Credit Union Consulting, Inc. (Synergy) have partnered to enhance the credit union training space with an online, **ON-DEMAND SUPERVISORY COMMITTEE CERTIFICATION PROGRAM**. This one-of-a-kind training platform provides credit unions:

- Content: current, industry-specific material
- Takeaways: applicable case studies
- Flexibility: on-demand accessibility as opposed to live webinars
- Incentive: benchmark quizzes for certification purposes
- Affordability: competitive pricing at individual or group rates

This platform offers everything to successfully execute your supervisory committee duties at your own pace. Through five instructional modules, participants will discover the attributes of a strong committee member, understand the audit universe, learn more about the month to month tasks, and deep dive into audit reports via case studies. Upon completion, each online student will earn certification from LCUL and Synergy valid for three years.

How do I become a Financial Counselor?



LCUL proudly embarks on our 8th year presenting an enhanced version of CUNA's Certified Financial Counseling Program (FiCEP) with webinar tutorials and live trainings. Those who successfully complete the program and exams will earn their **CREDIT UNION CERTIFIED FINANCIAL COUNSELOR (CCUFC) DESIGNATION**. The FiCEP curriculum includes:

- 8 modules presented in print format to be read at the student's pace
- 8 interactive webinars that recap and enhance each print module
- 8 fill-in-the-blank Study Guides/Practice Quizzes and answer key for each module
- 2 In-Person trainings include exam review, role playing, mind map implementation ideas
- Take-away tool kit including budget spreadsheets, spending plans, tracking methods
- 2 proctored online tests of 100 questions each – one mid-term and one final exam

Join the ranks of 400+ Certified Financial Counselors serving Louisiana's credit union members!

"Putting our staff through the FiCEP program has impacted our membership tremendously. Our latest Credit Score Migration Analysis showed that over 18% of our membership has improved their credit score since their loan originated. I'm confident that this is a direct result of our staff being more confident with their skills based off the education provided through FiCEP."

*- Chad Miller, CEO
Southwest Louisiana CU*

What is SRCUS Management School?



Louisiana is one of ten southern states that collaboratively host and administer this 3-year credit union management school in Athens, Georgia. The school is an 8-day immersive program that not only provides vital credit union management knowledge, but motivates and inspires students to excel in their roles and grow in the credit union movement.

Learning is supplemented year round with recommended reading materials, ratio webinars, completion of an in-depth analysis project of their own credit union, and writing a team whitepaper. By the time they graduate, a SRCUS student has truly done it all!

Did you know that The Louisiana Credit Union League even offers partial Scholarships to this career changing program? Look for our scholarship applications in mid-February!

"If you want to be challenged, taken out of your comfort zone and to bring about change in your credit union, (SRCUS) Southeastern Regional Credit Union School is the way to go. It is one of the greatest investments a credit union will make in regards to continuing education for their staff and succession planning." - Angie Baker, Heart of LA FCU