



Managing Commerical~Banking Relationships: How to Keep the Good Customers While Dealing with the Bad



December 13, 2017
Lisle, IL

December 14, 2017
Springfield, IL

Introduction

This one-day course focuses on commercial-loan portfolios and customer relationships at the lender level, using a six-step process for organizing a lender's portfolio to achieve both credit quality and sales/production goals.

Included are worksheets and case examples for organizing and improving the handling of relationships, with the goal of enhanced customer service and bank profitability within a community-bank environment.

The seminar also allows time to discuss and share best practices from among the participants – things that really work on the front lines.

Who Should Attend?

Community bankers, lenders, and portfolio managers that deal with commercial or business accounts, plus related support staff, credit analysts, and credit officers would all benefit from attending this seminar.

This one-day seminar provides 6 hours of credit toward the prestigious Certified Community Lender designation

About the Presenter

What Others Have Said:

"Richard was very interactive with his audience. Very personable and engaging."

Gina Persiani,
AVP Consumer Lending
Town Center Bank, Frankfort

"I really enjoyed the content and the speaker. He had great past-experience stories."

Jaden Widdersheim, Loan Officer
Shelby County State Bank,
Shelbyville

"Richard was excellent. Not only did he identify potential issues, but he also discussed possible solutions."

Ian Vanderford, Credit Analyst
First National Bank in Staunton

Richard Hamm has been training bankers for 26 years, designing and delivering courses specializing in commercial lending and credit, including portfolio and risk management, commercial real estate (CRE) and appraisals, plus selling and negotiating skills, and director training. His clients include national associations such as The Risk Management Association (RMA); regional banking schools such as the Barret School of Banking – Memphis, the Graduate School of Banking – Wisconsin, the Southwestern Graduate School of Banking – Dallas, the Graduate School of Banking at Colorado, and the Western States School of Banking; state-banking and community-banking associations in a dozen states; and individual banks.

He is based in Huntsville, AL, and has owned/operated Advantage Consulting & Training for 12 years, after a 22-year banking career including senior positions in lending and credit, plus president of a community bank through formation, then acquisition of an existing bank. He has BS and MBA degrees from the University of Alabama, Tuscaloosa.

Key Topics

- Key issues in determining and updating a credit risk grade
- Reducing delays in obtaining updated financial information from the customer
- Maximizing the cross-selling of non-lending products and services
- Common habits or practices of high-performing relationship managers
- Recognizing potential problem loans
- Loan-pricing tips and traps
- Practical ideas for setting and monitoring loan covenants
- Key early warning signals of problem loans or problematic relationships



Registration Fees

Fees include hand-out materials, refreshment breaks, and lunch. An income-tax deduction may be allowed for educational expenses undertaken to maintain or improve professional skills.

Cancellation Policy

Registrants cancelling two days prior to each seminar receive 100% refund; one day prior, 50%; the day of the seminar, no refund. **All cancellations must be made in writing prior to the seminar day. Invoices and training materials will be sent to all “no shows.”**

CBAI MEMBER

One person.....	\$265
Two or more from same banking institution.....	\$245 each

**PROSPECTIVE-MEMBER

One person.....	\$465
Two or more from same banking institution.....	\$445 each

CDD members receive a 10% discount.

**Only financial institutions/firms eligible for CBAI membership.

Registration Form

MANAGING COMMERCIAL-BANKING RELATIONSHIPS DECEMBER 13 & 14, 2017

Please specify preferred date and location.

___ December 13, 2017, Hilton Lisle/Naperville, Lisle

___ December 14, 2017, CBAI Headquarters, Springfield

Please Print

Name of Bank _____

Address _____

City, State, Zip _____

Tel. No. _____

Name/Title _____

E-Mail _____

(E-mail address required for registration).

Name/Title _____

E-Mail _____

(E-mail address required for registration).

___ I have special needs, please contact me before the seminar.

Please select your payment method.

___ Check Enclosed

___ Check in Mail

___ Pay at Door

___ Credit Card*

**If you are paying by credit card, please fill out the following information.*

(Visa & MasterCard accepted).

Name as It Reads on Card _____

Company Name on Card _____

Billing Address of Card _____

Card Number _____ Exp. Date _____

Three-Digit Security Code _____



Click it in:
www.cbai.com



Mail it in:
CBAI Education Department
901 Community Drive
Springfield, IL 62703-5184



Fax it in:
(217) 585-8738



Call it in:
(800) 736-2224 (Illinois only)
(217) 529-2265

Dates and Locations

December 13, 2017

Hilton Lisle/Naperville
3003 Corporate West Drive
Lisle, IL 60532
630/505-0900

December 14, 2017

SHAZAM Education Center
CBAI Headquarters
901 Community Drive
Springfield, IL 62703
217/529-2265

Agenda

Registration begins at 8:30 a.m. The seminar runs from 9 a.m. to approximately 4 p.m. Continental breakfast and lunch provided.

Continuing Education

CBAI is a registered Public Accounting Continuing Professional Education (CPE) provider by the Illinois Department of Financial and Professional Regulation.

For More Information

Tracy McQuinn, Senior Vice President
Valerie Johnston, Vice President
Melinda McClelland, Vice President
Jennifer Nika,
Administrative Assistant
Department of Education
& Special Events
800/736-2224 217/529-2265
Fax: 217/585-8738
Terry Griffin,
Vice President Chicago Area

Visit us on-line at www.cbai.com

