



# Advanced Loan Documentation

Webinar • March 22, 2010, 1:30-3:30 p.m.

An intensive, practical, "real world" review of critical loan documentation issues, best practices, proper lien creation and monitoring under the requirements of the Revised Article 9.

This webinar has been created for bankers who have a basic understanding of loan documentation obtained by training or experience and wish to further develop, refine, confirm or polish those skills. It deals with all types of collateral except real estate.

Program content is based on questions most frequently asked during seminars presented by the instructor on a nationwide basis. The program is not a theory lesson. Participants will receive a practical, "real world," intensive review of critical loan documentation issues, best practices, proper lien creation and monitoring under the requirements of the Revised Article 9 of the Uniform Commercial Code. Questions and special situations brought forth by participants will help deepen participants' understanding.

## Highlights

- Effective collateral description language for the security agreement and financing statement;
- Purchase money security interests;
- Perfecting liens on collateral not owned by the borrower;
- Importance of and new techniques for the UCC lien search;
- Required documentation for ensuring proper creation of "perfected," first lien security interests for all kinds of collateral except real estate;
- Security agreements, notes, and UCC financing statement forms;
- UCC filing requirements for each type of collateral;
- How, when and why of Guarantees and Co-signers;
- Signature requirements and supporting documentation requirements for all types of borrowers, including individuals, corporations, partnerships, LLCs and assumed names.

## Audience

Loan officers, credit analysts, note and credit department personnel, internal auditors, loan review and compliance personnel, or any banker involved in the lending function.

*CE Applied: 2.5 hrs. CRCM/CLBB/CPB with the Institute of Certified Bankers*

## Speaker

Bob Ullom, a nationally known banking educator, has taught loan documentation for 30 years. His presentations are low in theory and high in practical, "how to" information in a teaching style that is dramatic, humorous and well balanced as to education and keeping participant attention. Seminar participants will gain a substantial amount of ready to use information, techniques and procedures.

## What is a Webinar?

A webinar is an enhanced telephone seminar. The audio portion of the program is delivered by speaker phone. You may also view a corresponding PowerPoint presentation using a PC. No special hardware is needed. You may still participate by phone only. The program consists of 90 minutes instruction and 30 minutes live Q&A. Each webinar registration provides 1 connection to the live webinar, written materials and access to the Webinar Archive for 30 days following the broadcast. You may have unlimited listeners on your connection by speaker phone and PC. You will receive a PIN, written materials and instructions prior to the seminar. If you do not receive a confirmation at least 2 days prior to the event call 888-262-7701.

## What is an On-Demand Webinar?

An On-Demand Webinar is a live webinar that has been recorded and then streamed to your computer to watch at your convenience. The program can be viewed any time 24/7. You can watch a portion of the program, come back and pick up where you left off! You may also review the program at will if you need a refresher. Anyone at your branch may access the program from a computer using the login and password. When you purchase a webinar archive, you have unlimited access to the program for six months from the date of purchase.

Transmission, retransmission or republishing of the audio portion of the seminar is prohibited. Your registration entitles you to 1 connection at 1 location with permission to copy materials for participants. Complete one registration per location.

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CE Applied: 2.5 hours CRCM/CLBB/CPB

Check all appropriate boxes

Seminar Code: SW2-1138

Webinar/materials (live hookup)	<input type="checkbox"/> \$225	Nonmember	<input type="checkbox"/> \$275
On-Demand Webinar/materials*	<input type="checkbox"/> \$245	Nonmember	<input type="checkbox"/> \$295

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### Four Ways to Register:

Online: Visit [iowabankers.com](http://iowabankers.com) (Calendar of Events)

Fax: Complete credit card info and fax to 512-381-1571

Phone: Call 888-262-7701 with credit card information

Mail: Bankers Ed, 5700 S. Mopac, #C310, Austin, TX 78749

**Late Registration:** Please register online when registering 2 days prior to the event (credit cards & e-Checks accepted). Call 888-262-7701 for help.

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Seminar Content Questions: Contact IBA education department at (800) 532-1423.