



Advanced Loan Documentation

Webinar ▲ March 22, 2010 ▲ 1:30 - 3:30 CT

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 Awarded: 2 hrs. with the Texas State Board of Public Accountancy
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 is delivered by speaker phone. You may also view a corresponding PowerPoint presentation using a PC. No special hardware is needed. The program consists of 90 minutes instruction and 30 minutes live Q&A. Each webinar registration provides 1 connection to the webinar, materials and access to the On-Demand Webinar for 30 days following the broadcast. You may have unlimited listeners on your connection by speaker phone and PC. You will receive a PIN, 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.

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