



Understanding Business and Organizational Structure

Live Webinar

THURSDAY, MARCH 20, 2008 ~ 2:30 PM – 4:30 PM EST

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Banking rules and regulations require financial institutions to properly identify their prospects and borrowers prior to the approval of a loan request or opening a depository account. Identification of borrowers is a top priority of the five regulatory authorities. Since financial institutions receive requests to establish credit facilities and depository accounts from various types of organizational structures, it is vital for bankers to understand the difference of each.

TOPICS COVERED:

- Review of the various types of organizational structures
 - Definition of each business structure
 - Advantages and Disadvantages of each business structure from the borrowers' perspective
 - Risk considerations for bankers of each business structure
 - How each structure is legally organized
 - The tax implications of each type of business organizations
 - Types of organizing documents required to properly identify the borrower
 - Management structure and authority provided to officials of each business structure
 - Extent of personal liability of the partners, members or officers of each structure
 - Number of owners allowed for each business structure
- Plus frequent question and answer sessions throughout this presentation.

WHO SHOULD ATTEND: Anyone involved in opening depository accounts and lending to organizations. This will include: Customer Service Representatives, Branch Managers, Consumer Loan Officers, Commercial Loan Officers, Credit or Loan Review Officers, Credit Administration Personnel, and Loan Operation Personnel

SEMINAR PRESENTER: Teresa Allen works with financial institutions who want to improve sales and customer service performance in order to build success and grow profits. Teresa is owner of Success Strategies, a national training and consulting firm. She is a member of the National Speakers Association and past recipient of the ASTD Professional Trainer of the Year Award. Teresa has presented to the financial industry for over ten years at local, state and national meetings. She is author of Common Sense Service: Close Encounters on the Front Lines and is co-author of The Service Path: Your Roadmap for Building Strong Customer Loyalty. Teresa is a graduate of Miami University in Oxford, Ohio where she earned her B.S. in Business Administration with a degree in Marketing.

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