



TENNESSEE BANKERS  
ASSOCIATION *Service Since 1890*

# 2014 Workshop for Loan Assistants and Loan Processors

Developing  
Tomorrow's  
Lenders  
Today

**ONE-SITE ONLY**

**October 30 – Nashville**

*TBA Barrett Training Center*

## 2014 Workshop for Loan Assistants and Loan Processors

### Seminar Description

This day-long workshop is designed to increase the lending knowledge and administrative effectiveness of one of the most important positions in a community bank's lending staff—the loan assistant/loan processor. All of the objectives of the program are directed at increasing the performance effectiveness of these individuals.

### Delivery Method, Program Level, and Content

This live, overview program will cover the many issues and responsibilities of those who work with loan processing. Those who attend will gain resources to assist in dealing with issues involved in carrying through with these tasks and responsibilities.

### Who Should Attend

Loan assistants and loan processors, credit administration supervisors, and other members of the bank's loan support staff who have credit administration responsibilities.

### What will be covered

- The loan assistant's primary role in loan origination and bank profitability
- The loan assistant's role in developing and maintaining effective, working partnerships with lenders
- The loan assistant's role in compliance with federal lending regulations
- A complete review of the primary loan documentation for consumer, residential, and small business loans
- A variety of lending resources to increase the lending knowledge of loan assistants

### Lending Resources Handouts

- Lending risk management resources and regulatory websites
- Sample loan documentation
- Sample loan policy narrative
- Sample credit administration guidelines
- Sample loan underwriting guidelines and documentation procedures
- Sample loan closing checklists
- Sample post-closing loan review format

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## Date and Location

**October 30 – Nashville**

TBA Barrett Training Center

211 Athens Way - 800/964-5525 or 615/244-4871



These meeting locations are designated nonsmoking facilities and properties.

## Schedule

8:30 am	Registration
9:00 am	Program begins
Noon	Lunch
1:00 pm	Program resumes
4:00 pm	Adjourn

## Program Fees

TBA Members / Associate Members		Nonmembers
Early Registration	\$220	\$440
Early registration deadline is October 17.		
Registration	\$250	\$470
Day-of-Program	\$300	\$520

Fee covers instruction, instructional materials, continental breakfast, refreshment breaks, and lunch. Please register early. **Day-of-program registrants will be assessed an additional \$50 late registration fee.**

No written confirmation of seminar registration will be sent from the TBA.

Participation in TBA programs is limited to members, associate members, and nonmembers from an eligible membership category at applicable member or non-member rates.

## Program Instructor



**John Cochran**, Cochran Associates, LLC, has had a banking career, that spans over 35 years, where he has served in various lending and senior management positions. Cochran established Cochran Associates, LLC, in 2000 to provide bank training and consulting services. To date, he has presented lending seminars for many state banking associations and annually participates in eight commercial lending schools as a principal instructor or sole presenter. Cochran has been the lead faculty member of the Missouri School of Lending since 1990.

## Hotel Information

TBA has not blocked hotel accommodations for these programs. The hotels listed are close to the program sites for those who need overnight accommodations.

### SpringHill Suites Marriott Nashville MetroCenter

250 Athens Way - 615/244-5474

### Millennium Maxwell House Hotel

2025 Rosa L. Parks Boulevard  
- 615/259-4343 or 866/866-8086.

*TBA corporate rates available at both Nashville hotels.*



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ASSOCIATION** Service Since 1890

### For more information about this program, contact:

**Debbie Brickles** - [dbrickles@TNBankers.org](mailto:dbrickles@TNBankers.org)

Senior Vice President of Training and Development  
Tennessee Bankers Association  
211 Athens Way, Ste 100  
Nashville, TN 37228-1381  
800/964-5525 or 615/244-4871  
[www.TNBankers.org](http://www.TNBankers.org).

## General Information

**Attire:** Business casual attire is appropriate for all TBA programs. Because of temperature variations in meeting rooms, please bring a sweater or jacket for your comfort.

**Special Needs:** If you have a special need that may affect your participation in this program, or special dietary request, please send TBA a statement detailing your needs at least 10 days before the program. We will contact you to discuss accommodations.

**Cancellation Policy:** Cancellations received in the TBA office 5 business days prior to the scheduled program will be refunded in full. Due to commitments, cancellations received less than 5 business days prior to the scheduled program are not refundable. Substitutions are welcome. Registrants who do not attend the program or send a substitute will be responsible for the entire registration fee.

## Continuing Education Credit



Attendants qualify for 6.5 hours of Continuing Professional Education (CPE) credit in the area of Specialized Knowledge and Application. No advanced preparation required for this program. In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour. For more information regarding administrative policies or complaints, please contact our offices at 615/244-4871.

Tennessee Bankers Association is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.learningmarket.org](http://www.learningmarket.org)



This program has not been pre-approved for ICB CE credits. Attendants who require ICB credits should go to [www.aba.com/Training/ICB/Pages/member-cereview.aspx](http://www.aba.com/Training/ICB/Pages/member-cereview.aspx) for further instructions.

For additional continuing education credit information, call the TBA education department at 800/964-5525 or 615/244-4871.



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## 2014 Workshop for Loan Assistants and Loan Processors

October 30 – TBA Barrett Training Center, Nashville

Please print or type.

Name \_\_\_\_\_ E-mail \_\_\_\_\_

Name \_\_\_\_\_ E-mail \_\_\_\_\_

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Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Contact \_\_\_\_\_

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

Must be included.  
For educational tracking only.  
**Last 4 digits only:**

SS# \_\_\_\_\_

SS# \_\_\_\_\_

SS# \_\_\_\_\_

**4 WAYS TO REGISTER!** 1. Register online at [www.TNBankers.org](http://www.TNBankers.org) 2. Scan this form and e-mail it to [mjenkins@TNBankers.org](mailto:mjenkins@TNBankers.org) 3. Mail this form to the address to the right 4. Fax this form to 615/324-1990

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TOTAL ENCLOSED \$ \_\_\_\_\_

Method of payment ☐ VISA ☐ MasterCard ☐ Check

CK# \_\_\_\_\_ (Make checks payable to Tennessee Bankers Association)

Card # \_\_\_\_\_ Exp Date \_\_\_\_\_

Name as appears on card \_\_\_\_\_  
(please print)

Card billing address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Signature of cardholder \_\_\_\_\_

**RETURN COMPLETED FORM AND PAYMENT TO:**

Tennessee Bankers Association

ATTN: Monique Jenkins

211 Athens Way, Ste 100 • Nashville, TN 37228-1381

Phone: 615/244-4871 or 800/964-5525 Fax: 615/324-1990