

Opening Accounts for Small Businesses

WEBINAR – ON DEMAND WEB LINK – FREE CD ROM

Thursday, December 3, 2009

12 - 1:30 pm PT
1 - 2:30 pm MT
2 - 3:30 pm CT
3 - 4:30 pm ET

Do you know how to open, document, and properly identify small business accounts? Many fraud losses result from small businesses with a cash deposit followed by large stolen or counterfeit checks. How do we work with our small business customer and still protect our bank? How can small businesses change and add signers? What happens at death? Attending this important session will give you an opportunity to understand small business types and how to set up accounts to avoid risk.

Continuing Education: Attendance verification for CE credits provided upon request.



HIGHLIGHTS

- What must be done when a business owner dies?
- Understanding sole proprietor accounts
- Establishing single-member LLC accounts
- What happens when the corporation a single person? What about signing authority?
- Opening accounts for professionals such as CPAs and doctors
- Which businesses can have interest-bearing checking accounts and which cannot?
- What about accounts such as Avon, Mary Kay, newspaper distribution, etc?

WHO SHOULD ATTEND?

This informative session is directed to new account representatives, branch managers, customer service representatives, personal bankers, trainers, branch administration, and those who open accounts on the frontline.

MEET THE PRESENTER

**Deborah L. Crawford,
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