

Frontline *SkillWorks*: Top 10 Reasons Your Customer May Not Be Fully Insured by the FDIC

WEBINAR – ON DEMAND WEB LINK – FREE CD ROM

Tuesday, January 26, 2010

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

You are talking to one of your most loyal and wealthy customers. The customer asks, “Am I insured?” You pull the account cards and find some are 20 years old. They have missing signatures, erasures, and some suffixes without contracts at all. Is your customer properly insured?

Account reviews and proper training can help you identify issues and changes that may be necessary – especially for accounts that were opened before Customer Identification Program regulations became effective. Proper execution of account titling, signature cards, and resolutions is critical to ensure your customers are covered under the FDIC deposit insurance policies and guidelines. You must understand the connection between ownership and FDIC coverage to know whether accounts are adequately covered. Learn ten reasons why your customer might not be fully insured and how to avoid them.

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



HIGHLIGHTS

- Has your customer signed “personally” on signature cards?
- Does your customer have Certificates of Deposit or CDs with “mixed conjunctions?”
- Does the POD designation have a “qualifying beneficiary?”
- Is POD in the “title” of the account?
- Do you have joint accounts that are trusts or corporations?
- Unclear signature cards that default to “individual”
- Do you have corporations with more than \$250,000?
- Are your nonprofit organizations set up as “personal accounts?”
- Are sole proprietor accounts counted for business insurance?
- What happens when accounts are unclear and default from normal coverage?

WHO SHOULD ATTEND?

This informative session is directed to customer service representatives, tellers, personal bankers, branch managers, branch administration, officers, presidents, and all employees who may answer customer questions about FDIC insurance.

MEET THE PRESENTER

**Deborah L. Crawford,
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