2017 EMERGING BUSINESS LENDERS VIRTUAL CONFERENCE

June 13, 15, 20, 22 & 23

Everything that new and emerging business lenders need to know about how to leverage RMA when conducting an annual review.

Register by June 8th, 2017 for the bundle

CCUA
Canadian Credit Union Association

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Professional Development and Education

2017 EMERGING BUSINESS LENDERS VIRTUAL CONFERENCE

June 13, 15, 20, 22 & 23 | Register by June 8!

Everything that new and emerging business lenders need to know about how to leverage RMA when conducting an annual review.

Each day, credit union commercial lenders and business relationship managers are at ground level, working with their clients to build their business. Your business grows when their business grows. But what happens when one of your accounts experiences a significant event that disrupts their business, such as an illness or extended leader absence? The 2017 Emerging Business Lenders Virtual Conference takes you back to review Rock Solid Concrete. It's time for their annual review. You've just received notification that long-time owner and president, Daniel Lee has fallen ill. The CFO has called to discuss the impacts on their recent expansion project.

This year's Emerging Business Lenders Virtual Conference will leverage the Risk Management Association (RMA) eMentor tool as we explore the impacts. Subject mater expert Craig Williams is back again to walk us through the annual review and the RMA tools.

NEW for 2017! We've added a fifth BONUS session. "Your Business. Your Development. Your Brand. Your Success".

The world of business lending and account management can be exciting and intimidating all at the same time. As someone newer to their role, you're learning the basics of each business relationship and discovering how complex these relationships can be! Join us for this exciting value-add session where you'll learn to master the sweet-spot where your personal branch and technical competency meet. We'll show you why understanding your sweet-spot will help you win in your market. Join Jake Hassel-Gren as she takes us full speed into the exciting world of business development.

RMA eMentor is purchased by the Canadian Credit Union Association, and provided free of charge to each of our member credit unions.

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WEBINAR DESCRIPTIONS

Analyzing Non-Financial Risks with RMA

SESSION #1

Credit unions are in the risk business. Those who are dealing with commercial lending and business accounts must learn to identify, interpret and rate the risk that each of their clients present and then find that perfect balance between risk and pricing. In this session, we will work with Rock Solid Concrete, one year later, as they face a significant business challenge. Once again, we'll leverage the tools and training resources in RMA eMentor, to answer the following questions about our case; What are the industry & business risks? What are management & environmental risks? How does this impact our approach with the client?

JUNE 13, 2017
1:00 - 2:15 PM ET

REGISTER NOW

Understanding the Numbers

SESSION #2

For a commercial lender, the numbers drive the deal! In this session we'll talk cash flow. Working with Rock Solid Concrete, one year later, we have a fresh set of financial statements and will review the balance sheet, income statements and notes. We'll also leverage the Training Resources from RMA eMentor to explore best practices

JUNE 15, 2017
1:00 - 2:15 PM ET

REGISTER NOW

Your Deal; Structuring, Pricing, Presenting and Closing

SESSION #3

You've met with the CFO and have a better understanding of the challenges they are facing. What do you need to consider for structuring, pricing or presenting the deal? Are there any changes to recommend based on what you've uncovered in this year's annual review? This year's situation?

JUNE 20, 2017
1:00 - 2:15 PM ET

REGISTER NOW

Monitoring the Relationship

SESSION #4

What a day! Another member who is spending more than they're making. The annual review is complete. You've made your recommendations and they've been approved How do you monitor the relationship? Do you know what early warning signs look like? We'll continue our work with the tools and training resources provided by RMA eMentor and determine how they can assist us at this stage, with the client. Monitoring the Relationship

JUNE 22, 2017
1:00 - 2:15 PM ET

REGISTER NOW

Your Business. Your Development. Your Brand. Your Success.

SESSION #5

There's an art and science to understanding, how to structure and price deals, while at the same time, how to spot opportunities for additional solutions. Tying these together creates a top-notch Member experience. A key to success in this art and science is; to challenge yourself to move past the business that's walking in the door and attract the business that hasn't discovered you yet! The art lives in your Personal Brand. Who are you? Why would a potential member want to do business with you? What makes you stand-out from the competition? If potential new members don't know who you are because you're not visible in your market, then your technical competency doesn't matter.

JUNE 23, 2017
1:00 - 2:15 PM ET

REGISTER NOW

SPEAKER PROFILES

CRAIG WILLIAMS

Craig currently holds the position of Account Manager, with the Enterprise Development Unit at the Atlantic Canada Opportunities Agency (ACOA), Nova Scotia. Previously, he was the Manager of Commercial Lending, with a 7-branch Credit Union system in Halifax, Nova Scotia. Prior to entering the credit union system, Craig started his lending career in Halifax in 2001, with the Business Development Bank in their Entrepreneurship Centre, as an Account Manager.

Committed to learning and development, Craig has a certification as a Small Business Counselor (CBC) through the P.J. Gardiner Institute, Memorial University, holds his Commercial Lending Accreditation Designation through CUIC®, is a certified lean productivity level one Yellow Belt through Canadian Manufactures and Exporters, and also has his CUDA accredited Credit Union Director Designation. As a seasoned presenter, trained as a certified Dale Carnegie instructor, he has facilitated programs both within the credit union system and externally in the business and academic community. Craig is deeply motivated in working with credit union professionals, to facilitate their skills, growth and development, with the aspiration of advancing the success of Credit Union members throughout the country.

In addition to the facilitation work with Cusource, Craig is an active volunteer, as past Chair of the Board of East Coast Credit Union, Current Chair of the Credit Committee and executive committee member and past Board Chair with Supportive Housing for Young Mothers (SHYM) in Dartmouth, Nova Scotia.

Craig Williams, was born and raised in St. John's Newfoundland and currently resides in Dartmouth Nova Scotia, and is blessed with a wonderful wife and two wonderful children.

JAKE HASSEL-GREN, MBA

Jake Hassel-Gren has been designing, delivering and developing transformational learning and sales programs for more than 20 years. For the past 15 years, she worked in the financial sector, where she recently held the position of Vice President Commercial Banking. During her time in banking, one of Jake's responsibilities was designing and delivering customized learning to both large corporate groups and smaller, more intimate audiences. This work ultimately proved to be her true passion and in 2016, Jake left banking to start LEAP Advisory Services and launch LEAP Learning Lab.

Under her LEAP Advisory Services banner, she partners with industry leading companies on the development of specialized learning programs and other learning deliverables for customer facing teams and leaders. She also regularly facilitates learning both in-class and virtually for diverse audiences across a multitude of topics.

Jake is also the Founder of the LEAP Learning Lab. A Community of Practice for self-motivated women entrepreneurs, innovators, leaders, millennials and professionals in Canada. The Learning Lab programs are designed for Canadian women by Canadian women. Comprised of 10 instructors, her dynamic team delivers comprehensive learning across fifteen disciplines.

Jake has logged hundreds of hours in both virtual and in-class facilitation on a wide range of topics including; Credit Structuring, Business Development Strategies, Pipeline Management, Sales Process Delivery, Sales Leadership, Building Personal Brands, Net-Promoter System Implementation, Change Management, Team Synergy, Multi-Generational Team Dynamics, Leadership Development and Customer Experience Excellence. Her facilitation skills have significantly contributed to performance against targets for multiple teams at multiple financial institutions. Her last team customer facing team achieved 115% of overall target; which ranked her Top 5 in Canada.

REGISTRATION & PRICING

Conference Bundle

Purchase a single seat in all 5 sessions. (Non-transferable, single employee only)

- **Corporate Members - $399 (per employee)**
- **Pay As You Go - $479 (per employee)**

REGISTER NOW FOR BUNDLES

Individual Webinars

Attend as many webinars as you'd like and register for each separately. Use the "register now" links on page 2 and 3 or search by title in the **Learning Gateway** to register.

- **Corporate Members - $109 (per webinar)**
- **Pay As You Go - $130 (per webinar)**

REGISTER NOW

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For more information or registration assistance, contact Client Solutions:
ccua.com/cusource | 1.888.367.1386 | clientsolutions@ccua.com