



# Advanced Loan Documentation

March 22, 2010, 12:30 - 2:30 p.m. (MT)



An intensive, practical, "real world" review of critical loan documentation issues, best practices, proper lien creation and monitoring under the requirements of the Revised Article 9.

This webinar has been created for bankers who have a basic understanding of loan documentation obtained by training or experience and wish to further develop, refine, confirm or polish those skills. It deals with all types of collateral except real estate.

Program content is based on questions most frequently asked during seminars presented by the instructor on a nationwide basis. The program is not a theory lesson. Participants will receive a practical, "real world," intensive review of critical loan documentation issues, best practices, proper lien creation and monitoring under the requirements of the Revised Article 9 of the Uniform Commercial Code. Questions and special situations brought forth by participants will help deepen participants' understanding.

### Highlights

- Effective collateral description language for the security agreement and financing statement;
- Purchase money security interests;
- Perfecting liens on collateral not owned by the borrower;
- Importance of and new techniques for the UCC lien search;
- Required documentation for ensuring proper creation of "perfected," first lien security interests for all kinds of collateral except real estate;
- Security agreements, notes, and UCC financing statement forms;
- UCC filing requirements for each type of collateral;
- How, when and why of Guarantees and Co-signers;
- Signature requirements and supporting documentation requirements for all types of borrowers, including individuals, corporations, partnerships, LLCs and assumed names.

### Speaker

**Bob Ullom**, a nationally known banking educator, has taught loan documentation for 30 years. His presentations are low in theory and high in practical, "how to" information in a teaching style that is dramatic, humorous and well balanced as to education and keeping participant attention. Seminar participants will gain a substantial amount of ready to use information, techniques and procedures.

### Audience

Loan officers, credit analysts, note and credit department personnel, internal auditors, loan review and compliance personnel, or any banker involved in the lending function.

*CE Applied: 2.5 hrs. CRCM/CLBB/CPB with the Institute of Certified Bankers*

### What is a Web Seminar?

A web seminar is an enhanced telephone seminar. The audio portion of the program is delivered by speaker phone. You may also view a corresponding PowerPoint presentation using a PC. No special hardware is needed. You may still participate by phone only. The program consists of 90 minutes instruction and 30 minutes live Q&A. Each web seminar registration provides one connection to the live web seminar, written materials and access to the Web Seminar Archive for 30 days following the broadcast. You may have unlimited listeners on your connection by speaker phone and PC. You will receive a PIN, written materials and instructions prior to the seminar. If you do not receive a confirmation at least 2 days prior to the event call 888/262-7701.

**Please check all appropriate boxes**

**SW2-1138**

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**March 22, 2010**

Web Seminar/materials (live web seminar)

\$250 mem       \$500 non-mem

Archive/materials\*

\$270 mem       \$540 non-mem

\*Unlimited online access to a copy of the webinar for 6 months from purchase date.

\*We cannot guarantee registration for incomplete and/or illegible registration forms received. Please complete the form and type or write carefully.

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-Preferred Payment Method: Online or e-Check

-Payment Must Accompany Registration - Invoices are Not Provided

### Four Ways to Register:

Online: Visit [www.montanabankers.com](http://www.montanabankers.com) (Education)

Fax: Fax completed form with credit card information to 512/381-1571

Mail: Mail completed form with check to Bankers Ed, 5700 S. Mopac, #C310, Austin, TX 78749 by March 12, 2010

Phone: Call Bankers Ed at 888/262-7701

\*Late Registration: Please register online when registering 2 days prior to the event (credit cards & e-Checks accepted). Call 888/262-7701 for assistance.

### Method of Payment (check one):

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