

24 LOAN ASSISTANT AND LOAN PROCESSORS WORKSHOP

***Please Check your location.

- April 30- Tulsa Marriott Southern Hills
- May 1- Harris Event Center/OBA

OBA MEMBERS: REGISTER ONLINE AT WWW.OBA.COM.

Earlybird fee by April 16: \$285

Regular fee after April 16: \$300

Non-members: \$600

The fee includes instruction, materials, breaks and lunch.

Cancellation requests must be made in writing and be received by April 16, 2024 to receive a full refund. A 50-percent refund will be given on all cancellations received by April 23, 2024. No refunds will be given on requests received after April 23, 2024; however, substitutions may be made.

BANK/CO. _____

PHONE _____

FAX _____

P.O. BOX _____ **CITY** _____

ZIP _____

NAME _____

TITLE _____

EMAIL _____

CELL PHONE _____

NAME _____

TITLE _____

EMAIL _____

CELL PHONE _____

PAY BY CREDIT CARD:

For security reasons, please e-mail your registration form and credit card information to:

secure e-mail: secure@oba.com

BILL TO VISA MASTERCARD AMEX DISCOVER

CARDHOLDER NAME _____

CARD # _____

EXPIRATION DATE _____ **CVC#** _____

SIGNATURE _____

PAY BY CHECK:

Mail this form with payment to:

Oklahoma Bankers Association
P.O. Box 960173
Oklahoma City, OK 73196-0173

SCHEDULE

8:30 a.m. Registration

9 a.m. to 3:30 p.m. Program

LOCATION

Harris Event Center at the OBA
643 N.E. 41st St., Oklahoma City
405-424-5252

Tulsa Marriott Southern Hills
1902 East 71st, Tulsa
918-493-7000

ACCOMMODATIONS

OKC
Residence Inn Bricktown
400 E. Reno Ave.
Oklahoma City, OK 73104
405-601-1700
Use Code OKBA for rate of \$122
Free breakfast, Self parking \$18/day.

Embassy Suites, OKC Medical Center
741 N Phillips Ave
405-239-3900
Ask for the OBA business rate of \$146
Made to order breakfast, Self parking \$14/day.

Tulsa
Tulsa Marriott Southern Hills
1902 E. 71st St., Tulsa
918-493-7000
Ask for the OBA corporate rate of \$129.

QUESTIONS?

Call Nancy, Debbie or Janis at the OBA for further information at 405-424-5252, or email Janis at janisr@oba.com.
If you have a disability that may impact your participation in this event, please forward a statement regarding any special needs to the OBA. We will contact you to discuss accommodations.



Loan Assistant and Loan Processors Workshop



4/30/2024 | TULSA
5/1/2024 | OKC



TULSA



OKC



COURSE DESCRIPTION

This workshop is designed to provide 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 the objectives of this program are directed at increasing the performance effectiveness of these individuals.

WHO SHOULD ATTEND

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

SCHEDULE

8:30-9:00 am.....Registration
9:00-10:30 am.....Program
10:30-10:45 am.....Break
10:45 am-12:00 pm.....Program resumes
12:00-1:00 pm.....Lunch provided
1:00 pm.....Program resumes
3:00-3:30 pm.....Adjourn

* Schedule subject to minor changes

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, including a discussion on the Truth-in-Lending/RESPA disclosures.
- Updated HMDA reporting information.
- A 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 Resource will include:

- Lending risk management 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.

SPEAKER

Ron Rushing is the President of Rushing Consulting Group, LLC in Sparta, Missouri. During his banking career he has served as a safety and soundness examiner, a commercial loan officer, director of loan review/internal audit and Chief Credit Officer. He is a frequent speaker for state banking associations on topics including commercial lending, credit risk management, cash flow/financial statement analysis and loan documentation.

REGISTRATION

To qualify for the early bird fee of \$285, you must register by April 16, 2024. The fee after April 16, 2024 is \$300. Non-member fee is \$600. The fee is per person; instruction, materials, breaks and lunch are provided.