

Members & Trust Accounts

DISTANCE LEARNING

Wednesday, March 10, 2010 • 3:00 pm – 4:30 pm Eastern

Your member just went to an attorney and put all his or her assets into a living trust. He or she is now standing in front of you and wants you to update the account cards and make sure all assets are re-titled in the name of the trust. You look at the member service representative next to you and wish you had gone to lunch. But formal trusts, like business accounts, are not difficult if you understand what they are designed to accomplish; who the players are; and the due diligence issues. This webinar is designed give you the information you need to confidently open formal trusts in share accounts.

HIGHLIGHTS

- Living Trusts, Miller Trusts, Marital Trusts, Family Trusts
- Understanding the mechanics of a formal trust and what your member is trying to accomplish
- What is a trust agreement?
- Who are the players of a trust?
- Can a trust be a member of a credit union?
- What happens when grantors/trustees die?
- What about NCUSIF insurance and trusts?
- How to change existing accounts when a trust comes into play
- Can you have an authorized signers, agents or powers-of-attorney on a trust account?
- What is the difference between a formal trust and the informal trust or pay on death account?

ABOUT THE PRESENTER – Deborah L. Crawford, gettechnical inc.

Deborah Crawford is the President of gettechnical inc., a Baton Rouge-based firm, specializing in the education of financial institutions across the nation. Her 20+ years of experience began at Hibernia National Bank in New Orleans. She graduated from Louisiana State University with both her bachelor's and master's degrees. Debbie specializes in the education of financial institution employees and officers in the area of deposit account laws, new account documentation, insurance, complex compliance regulations and IRAs.

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Sign Us Up!

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Credit Union _____

Address: _____

Contact Person _____

Format Ordered _____

Email Address _____

Phone _____ Fax _____



Payment Method:

Enclosed is a share draft/check for \$ _____ payable to Tennessee Credit Union League.

A share draft/check for \$ _____ payable to Tennessee Credit Union League will follow.

I authorize Vol Corp Credit Union to debit the credit union account for \$ _____

Account #: _____ Authorized Signature: _____

(Requires prior completion of Authorization Agreement for Direct Payments [ACH Debits].)

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