



WASHINGTON BANKERS ASSOCIATION

Crafting Commercial Loan Docs & Presentations

August 19, 2015 Seattle, WA

The first part of the seminar will cover the basics of how to craft an effective commercial loan write-up. This section will begin with a brief overview of loan write-ups or credit memorandums including types, styles, and necessary component parts (relationship information, financial analysis, management review, and risk assessment/mitigation).

The second part of the seminar will review loan committee presentation "skill building techniques" that include the "do's & don'ts" of loan committee, "reading" the personalities of the committee members, understanding the difference between an "outside" versus "inside" committee member, and exploring "group dynamics."

Course Objectives:

- Gain an understanding of effective presentation skills in loan committee
- Learn to make motivating presentations and conquer fear and intimidation
- Analyze the "do's and don'ts" of loan committee, personality types, group dynamics
- Review the related topics of negotiation skill building, communications, and personal marketing
- Summarize the seminar concepts through role playing scenarios

About the Instructor

David Osburn is the founder and managing member of Osburn & Associates LLC. His background includes over 27 years in banking, finance, and marketing. His bank commercial lending credentials include comprehensive loan underwriting, management, customer development, and loan work-out experience

Date/Time:

August 19, 2015 9am - 4pm

Cost:

WBA/OBA Members: \$395, \$445 after August 5
Non-Members: \$675, \$775 after August 5

Location:

Washington Bankers Association
1601 Fifth Avenue, Suite 1120, Seattle, WA 98101

Registrant Information *(copy for more than one registrant)*

Name _____ Title _____

Company _____

Address _____ City/ST/Zip _____

Email _____ Phone _____

Registration Total Cost \$ _____

Payment Information

Please charge my credit card Check is enclosed

Card Number _____ Exp Date _____

Billing Address _____ City/ST/Zip _____

Name on Card _____ Signature _____

Please Send Invoice to Attention of: _____

Make check out and send registration information to:

Washington Bankers Association, 1601 Fifth Avenue, Suite 1120, Seattle, WA 98101.

Call us at (206) 447-1700. Fax your registration to (206) 223-6453.

Cancellation Policy: For all cancellations that occur up to seven days prior to the start date, a \$50 cancellation fee will be charged. For cancellations with less than seven days notice, there will be no refunds. A substitute can attend at no fee. For cancelled courses and/or seminars, full fees will be refunded. Cancellation Procedure: Cancellations must be sent in writing to the WBA office via email, fax, or mail. No refunds will be granted until a written cancellation request is received by WBA.