



# Development Program Recommended Prerequisites

If you are considering registering for one of the WBA's Development Programs, we strongly recommend these courses to help prepare you. These classes, offered through the American Bankers Association, provide underlying skills that are necessary for each program and are available on-line at your convenience.

## MANAGEMENT

### ○ Leadership In Action Suite • \$195

This suite of five courses explores techniques and best practices for cultivating a collaborative team environment, from empowering individuals and positively handling change to creating a team-supported vision and achieving goals. Completing this suite provides strategies for using authentic leadership skills in day-to-day practices and developing those skills in others. Concise, impactful lessons can be applied on the job immediately.

### ○ Management Essentials Suite • \$275

This suite of six courses explores best practices for successfully managing employees, from interviewing to managing performance. Completing this suite provides tips and tactics for coaching employees, developing a recognition program, and holding effective meetings. Concise, impactful lessons can be applied on the job immediately.

### ○ Fundamentals of Small Business Banking Suite • \$95

This suite of two courses explores the characteristics, expectations, and operational needs of small businesses. Explore the different legal structures and business types to better understand your small business clients. Discover the different steps in each type of operating cycle and the stages of a small business' life cycle. Completing this suite helps develop the key skills needed to create and sustain successful small business relationships. Concise, impactful lessons can be applied on the job immediately.

## COMMERCIAL LENDING

### ○ Analyzing Business Financial Statements and Tax Returns • \$275

This course covers an analysis of business financial statements and tax returns, including cash flow and statements.

### ○ Analyzing Financial Statements • \$455

A practical introduction to financial statement analysis from the perspective of the commercial loan officer. Gain the skills needed to effectively assess the risks related to a customer—current and prospective—and evaluate possible sources of repayment for the loan.

### ○ General Accounting • \$471

Topics in analyzing source documents, recording business transactions in a journal and posting entries in a ledger. How to prepare a trial balance, gather adjustment data and complete a worksheet are covered, as well as how to prepare financial statements and post-closing entries.

## CREDIT ANALYST

### ○ General Accounting • \$471

Topics in analyzing source documents, recording business transactions in a journal and posting entries in a ledger. How to prepare a trial balance, gather adjustment data and complete a worksheet are covered, as well as how to prepare financial statements and post-closing entries.

### ○ Analyzing Financial Statements • \$455

A practical introduction to financial statement analysis from the perspective of the commercial loan officer. Gain the skills needed to effectively assess the risks related to a customer—current and prospective—and evaluate possible sources of repayment for the loan.

### ○ Loan Structuring, Documentation, Pricing and Problem Loans • \$275

Guidance on loan structuring and documentation issues in response to the quantitative and qualitative risk analysis. An overview of documents, loan agreements and covenants, as well as negotiating and pricing is included.

## RETAIL BRANCH MANAGER

### ○ Essential Selling Skills Bundle • \$195

This bundle of five suites includes 13 courses and five exercise modules to build essential sales and service skills. Completing this bundle provides best practices for each step in the sales process and building solid client relationships. Explore tactics to focus sales efforts, including the Sales Portfolio Process. See how to effectively plan calls, track contacts, anticipate potential objections, and make sales. Concise, impactful lessons can be applied on the job immediately.

### ○ Servicing and Growing Small Business Relationships • \$95

Introduces the benefits of proactively following up with small business clients through monitoring financial information, client records, and resources to extend the business relationship beyond the initial sale. This course also explains the advantages of conducting site visits and what is required to uncover employee and business information.

### ○ Management Essentials Suite • \$275

This suite of six courses explores best practices for successfully managing employees, from interviewing to managing performance. Completing this suite provides tips and tactics for coaching employees, developing a recognition program, and holding effective meetings. Concise, impactful lessons can be applied on the job immediately.

To register for any of these programs, or other online courses offered by the ABA, please contact Duncan Taylor at [duncan@wabankers.com](mailto:duncan@wabankers.com) or call (206) 344-3492.

# WBA Registration Form

## Primary Contact/Registrant

Name \_\_\_\_\_ Title \_\_\_\_\_ Phone \_\_\_\_\_

Company \_\_\_\_\_ Email \_\_\_\_\_

**Registering self:**  Yes  No

## Program Information

Program Title \_\_\_\_\_ Program Date(s) \_\_\_\_\_ Program Cost \$ \_\_\_\_\_

## Additional Registrants (up to eight – please duplicate form for more registrants)

Name \_\_\_\_\_ Title \_\_\_\_\_

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**Total Cost** \$ \_\_\_\_\_  Please Invoice  Please charge my credit card

Card Number \_\_\_\_\_ Exp Date \_\_\_\_\_

Billing Contact Name \_\_\_\_\_ Billing Contact Email Address \_\_\_\_\_

**Email form to:** [reg@wabankers.com](mailto:reg@wabankers.com)

*\*Attendance at WBA programs is limited to employees, officers and directors of WBA members, non-members eligible for membership in the WBA and members of other state banking associations which grant reciprocal privileges to WBA members.*

**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.