

## CREDIT ANALYSIS MANAGER SEMINAR

JUNE 7, 2019 | RALEIGH, NC

### Course Overview

As commercial banking business gets more competitive and margins are more compressed, credit and underwriting teams enter the spotlight for significant opportunities to add value to their organizations through efficiencies, improved capacity, and consistency in delivering credit services. You may have the best banking products at the lowest pricing and the best sales teams, but if your credit group does not work, you will not be able to win and close deals and will not be able to manage your portfolio to ensure credit quality and minimize credit losses.

The course provides you with the resources to be successful in strategically managing the day-to-day realities while developing a plan to move your team in the right direction. In addition to providing good foundational practices for managing successful credit teams, the course will equip you with techniques and strategies to build a high performing and committed team.

### Who will benefit?

Team leaders who oversee credit analysis, portfolio management, and underwriting teams as well as assistant team leaders or soon to become managers will benefit by taking this course.

### You will:

- Be able to create and implement a 12-month plan to build a high-performing credit team:
  - Materially improve team productivity and efficiencies.
  - Develop processes that drive consistency of your team's performance.
  - Link goals of the organization to specific goals of the team.
  - Increase team-member commitment and satisfaction.
- Develop more effective and successful managers, including developing an ability to influence teams and increase positive organizational impact.
- Attract, develop, and retain highly efficient and skilled credit staff.
- Materially improve quality of underwriting and turnaround of deals.

- Make your organization more competitive by improving your credit team as opposed to the conventional and outdated model of primarily investing into the sales side of business.
- Improve efficiency and relationship between credit and lending teams.

### Prerequisites

Prior management experience is desired but not required. The only prerequisite is an open mind and willingness to explore new managerial techniques and approaches.

**Please Note:** Once you register, you will receive a confirmation email. Please contact Customer Care, 1-800-677-7621 or [registrar@rmahq.org](mailto:registrar@rmahq.org) if you don't receive the email within one business day.

Credit Risk  
Certification:  
8 CEUs (each)

NASBA:  
8 CPE Hours  
(each)

IT'S SMART TO BE AN  
ASSOCIATE MEMBER.

RMA Associate Members enjoy  
**preferred pricing** on all chapter  
cosponsored open enrollment courses.



# Credit Analysis Manager Seminar

June 7, 2019 | Raleigh, NC | Event # 349528-19

Registration Fee (All prices in U.S. dollars)

- Associate members: \$695
- Nonassociates from member institutions/  
professional members: \$795
- Nonmembers: \$995

**Promotional Code: CHP**

Mr.  Ms.  Mrs.

First name \_\_\_\_\_ M.I. \_\_\_\_\_ Last name \_\_\_\_\_

Nickname (for badge) \_\_\_\_\_ Title \_\_\_\_\_

Institution \_\_\_\_\_

Mailing address \_\_\_\_\_

City \_\_\_\_\_ State/province \_\_\_\_\_ Zip/postal code \_\_\_\_\_

Country \_\_\_\_\_ **Attention Canadian registrants:** Please be advised that remittance of GST tax is your responsibility. RMA is not required by law to register and collect GST taxes in Canada.

Phone # \_\_\_\_\_ Email \_\_\_\_\_

## Billing Information Same as above

Name \_\_\_\_\_ Institution \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State/province \_\_\_\_\_ Zip/postal code \_\_\_\_\_ Country \_\_\_\_\_

## Cancellation and Transfer Policies\*

**Cancellations:** A full refund of course registration fees will be issued for cancellations received 15 or more business days prior to the event start date; 50% if cancelled 6-14 business days prior, and no refund for 5 or fewer days. If you fail to attend the event, you forfeit the entire fee. In the event the course is cancelled by RMA, you will receive a full refund for registration fees. However, RMA does not assume responsibility for any other expenses, including the purchase of airline tickets, incurred by you in connection with attending the event.

**Transfers:** You may transfer one time to a new date up to five or more business days prior to the event. If you are unable to attend a similar event within one year from the original registration date, you forfeit the entire registration fee.

*Please note: Written (fax 215-446-4100 or email registrar@rmahq.org) cancellation is required to process all refunds and transfers.*

Please choose your discipline. Check all that apply:

- Enterprise risk
- Credit risk
- Market risk
- Operational risk
- Regulatory compliance
- Securities lending
- Not in a risk discipline

Use our tailored email alerts to keep informed in your area of interest, which you can update below:

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> <b>Annual Statement Studies</b>                        | <input type="checkbox"/> Consumer Banking                                       | <input type="checkbox"/> Institutions with assets of \$50 billion and up         |
| <input type="checkbox"/> <b>Enterprise Risk Management</b>                      | <input type="checkbox"/> Commercial Real Estate                                 | <input type="checkbox"/> <b>Market Risk Management</b>                           |
| <input type="checkbox"/> Institutions with assets up to \$10 Billion            | <input type="checkbox"/> Credit Department/Portfolio Management                 | <input type="checkbox"/> Institutions with assets between \$10 and \$50 Billion  |
| <input type="checkbox"/> Institutions with assets between \$10 and \$50 Billion | <input type="checkbox"/> Healthcare Lending                                     | <input type="checkbox"/> Institutions with assets between \$50 and \$180 Billion |
| <input type="checkbox"/> Institutions with assets of \$50 billion and up        | <input type="checkbox"/> Loan Review/Audit                                      | <input type="checkbox"/> Institutions with assets of \$180 billion and up        |
| <input type="checkbox"/> <b>Credit Risk Management</b>                          | <input type="checkbox"/> Loan Operations  | <input type="checkbox"/> <b>Regulatory Compliance</b>                            |
| <input type="checkbox"/> Credit and Lending Training                            | <input type="checkbox"/> <b>Operational Risk Management</b>                     | <input type="checkbox"/> <b>Securities Lending</b>                               |
| <input type="checkbox"/> Agricultural Lending                                   | <input type="checkbox"/> Institutions with assets up to \$10 Billion            |  |
|   | <input type="checkbox"/> Institutions with assets between \$10 and \$50 Billion |  |

## Five ways to register

Web: [www.rmahq.org](http://www.rmahq.org) / Phone: 800-677-7621 / Fax: 215-446-4100

Email: [registrar@rmahq.org](mailto:registrar@rmahq.org) / Mail: RMA, Lbx 1140-PO Box 8500, Philadelphia, PA 19178-1140

Check enclosed  VISA  MasterCard  AMEX  Diners Club  Discover

Credit Card number \_\_\_\_\_ Exp. date \_\_\_\_\_

Signature \_\_\_\_\_

I understand my signature authorizes The Risk Management Association to charge my credit card for this purchase.

This section must be filled out in order to properly process your registration.

Which best describes your job function? Please check all that apply.

- Auditor
- Business Line Operational Risk Manager
- CEO/President
- Chief Credit Officer
- Chief Risk Officer
- COO
- Chief Operational Risk Officer
- Chief Information Officer/Director IT
- Chief Regulatory Affairs Officer
- CFO/Finance
- Chief/Senior Lender
- Compliance Officer/Manager
- Corporate Operational Risk Manager
- CPA/Attorney/Appraiser
- Credit Administration/Department
- Credit Policy Officer
- Dean/Professor/Teaching Assistant
- Government Agency
- Human Resources/Training Director
- Insurance
- IT Manager
- Legal Counsel
- Loan Review/Administration
- Market Risk Officer
- Nonbank/Nonfinancial
- Portfolio Management Officer
- Regulator/Examiner
- Relationship Manager/Lender
- Risk Management Officer
- Secretary/Admin. Assistant
- Securities Lending
- Securities Trader
- Student
- Underwriter/Analyst
- University/Librarian

Which best describes your area of specialty? Please check all that apply.

- Agricultural Lending
- Audit
- Commercial Banking
- Consumer/Retail Banking
- Corporate Office
- Credit Department
- Credit Risk
- Custody
- Enterprise Risk
- Finance Function
- Funds Management
- Health Care
- International/Global Banking
- Investment Banking
- IT
- Legal
- Life/Health Insurance
- Market Risk
- Nonbank/Nonfinancial Institution
- Nonprofit/University
- Operational Risk
- Operations
- P&C Insurance
- Private Banking/Wealth Management
- Real Estate Lending
- Sales and Marketing
- Securities Lending
- Securities or Fixed-Income Trading

