



# Opening & Managing Certificates of Deposit

(90-minute webinar – available live or on-demand)

**Monday, November 15, 2021**

**This is a morning webinar**

8:00 AM Pacific

9:00 AM Mountain

10:00 AM Central

11:00 AM Eastern

[Register Here](#)

Don't miss this chance to learn all about time deposits and tips for making your processes more efficient and fluid. Now is the time to find out if your procedures are obsolete or on the mark!

## **AFTER THIS WEBINAR YOU'LL BE ABLE TO:**

- Define what is and what is not a Certificate of Deposit or Time Deposit
- Understand Reg D limitations on these accounts
- Follow Truth In Savings requirements for subsequent notices
- Let go of obsolete procedures in losses of certificates

## **WEBINAR DETAILS**

Today's certificates of deposit are really *time deposits*. Many institutions still manage these accounts with a great deal of paper and obsolete practices. Is it time to change? Since these accounts are nonnegotiable instruments today, what can you do to reduce paper and make the process more fluid? What are the current rules and regulations and what is outdated? Learn the ins and outs of opening and managing these accounts with this informative webinar.

## **WHO SHOULD ATTEND?**

This timely program will benefit deposit compliance staff, deposit operations personnel, marketing staff, the frontline, and all branch staff, including new accounts, administration, and branch managers.

## **TAKE-AWAY TOOLKIT**

- New account handbook
- Employee training log
- Interactive quiz

## **DON'T MISS THESE RELATED WEBINARS!**

**Frontline Microlearning Modules**

on Wednesday, January 1, 2020

**E-SIGN Series:**  
**"No-Contact" Account Opening: E-SIGN Compliance**  
on Thursday, February 11, 2021

**New Accounts Series:**  
**20 Legal Types of Accounts: Ownership, Documentation & CIP**  
on Wednesday, September 8, 2021

**MEET THE PRESENTER**

**Deborah L. Crawford, Gettechnical Inc**

Deborah Crawford is the President of Gettechnical Inc., a Florida-based firm, specializing in the education of financial institutions across the nation. Her 30+ 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 areas of deposit account laws, new account documentation, insurance, complex compliance regulations, and IRAs.

**THREE REGISTRATION OPTIONS – WHAT YOU GET**

**1. Live Webinar Includes**

- Unlimited connections within your institution to the Live Webinar
- Handout and Take-Away Toolkit
- Available on desktop, mobile & tablet
- Presenter's contact info for follow-up

**2. On-Demand Webinar Includes**

- Recording of the Live Webinar
- Available two business days following Live date
- Handout and Take-Away Toolkit
- Available on desktop, mobile & tablet
- Free Digital Download, yours to keep
- Share link with anyone at your institution
- Presenter's contact info for follow-up

**3. Purchase the **BOTH Option** to receive all the benefits listed above! Full registration descriptions can be found [here](#).**

If you need help with anything, please drop us an email at [support@financialedinc.com](mailto:support@financialedinc.com) or call 406.442.2585