



Financial Education & Development
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2025 Credit Union Series

Revised 9/27/2023

All webinars will be held at 2:00 p.m. Central.

BSA Exam Manual Series

- 2/5/2025 **BSA Exam Manual Series:**
History, Risk Assessments, Training, Audits, Internal Controls & BSA Officers
Deborah L. Crawford, Gettechnical Inc.
- 3/4/2025 **BSA Exam Manual Series:**
CIP, CDD & High-Risk Customers
Deborah L. Crawford, Gettechnical Inc.
- 4/9/2025 **BSA Exam Manual Series:**
SARs & CTRs: Program Management & Exemptions
Deborah L. Crawford, Gettechnical Inc.
- 5/7/2025 **BSA Exam Manual Series:**
Monetary Instrument Records, Funds Transfers, 314a, 314b & OFAC & Special Measures
Deborah L. Crawford, Gettechnical Inc.

Call Report Series

- 1/14/2025 **Call Report Series:**
2025 Call Report Update & Avoiding Costly Mistakes
Stephen J.M. Schiltz, CLA
- 4/15/2025 **Call Report Series:**
Call Report Fundamentals for New Preparers & Reviewers
Stephen J.M. Schiltz, CLA
- 7/15/2025 **Call Report Series:**
Call Report Schedule A (Lending): Complexity Clarified
Stephen J.M. Schiltz, CLA
- 10/16/2025 **Call Report Series:**
Call Report Financial Statements B-E
Stephen J.M. Schiltz, CLA

Credit Analysis & Lending Series

- 8/12/2025 **Credit Analysis & Lending Series:**
Cash Flow Analysis: Debt Service Coverage, Global Cash Flow & More
Robert L. Viering, RiverPointUSA LLC
- 9/16/2025 **Credit Analysis & Lending Series:**
Deeper Cash Flow Analysis, Balance Sheet & External Factors
Robert L. Viering, RiverPointUSA LLC
- 10/14/2025 **Credit Analysis & Lending Series:**
C&I Lending for CRE Lenders
Robert L. Viering, RiverPointUSA LLC
- 11/13/2025 **Credit Analysis & Lending Series:**
Collateral Analysis: Evaluation, Weaknesses & Monitoring Values
Robert L. Viering, RiverPointUSA LLC

Deposit Reg Series

- 7/30/2025 **Deposit Reg Series:**
Truth in Savings Act
Deborah L. Crawford, Gettechnical Inc.
- 8/27/2025 **Deposit Reg Series:**
Regulation CC
Deborah L. Crawford, Gettechnical Inc.
- 9/24/2025 **Deposit Reg Series:**
Regulation E
Deborah L. Crawford, Gettechnical Inc.
- 10/29/2025 **Deposit Reg Series:**
Regulations D, P & GG
Deborah L. Crawford, Gettechnical Inc.

Frontline Series

- 1/15/2025 **Frontline Series:**
Comprehensive Teller Training: Checks, Compliance, Security & BSA
Deborah L. Crawford, Gettechnical Inc.
- 2/6/2025 **Frontline Series:**
Opening Deposit Accounts for Nonprofit Organizations
Deborah L. Crawford, Gettechnical Inc.
- 3/12/2025 **Frontline Series:**
Opening & Maintaining Consumer Accounts
Deborah L. Crawford, Gettechnical Inc.

4/23/2025 **Frontline Series:**
Minor Accounts: Ownership, CIP, Access, Changes & Transactions
Deborah L. Crawford, Gettechnical Inc.

5/21/2025 **Frontline Series:**
Opening & Maintaining Business Accounts
Deborah L. Crawford, Gettechnical Inc.

6/26/2025 **Frontline Series:**
Identifying Fraud on the Frontline
Dawn Kincaid, Brode Consulting Services, Inc.

IRA Series

1/21/2025 **IRA Series:**
Final IRA RMD Regulations, Deadlines, Calculations, Reporting & More
Loni Porta, Convergent Retirement Plan Solutions, LLC

1/27/2025 **IRA Series:**
Monday IRA & HSA Update: The Latest Changes & Issues
Loni Porta, Convergent Retirement Plan Solutions, LLC

3/11/2025 **IRA Series:**
IRA Beneficiary Designations & Distributions: Options, Best Practices & Compliance
Loni Porta, Convergent Retirement Plan Solutions, LLC

9/18/2025 **IRA Series:**
Traditional & Roth IRAs Part A: Eligibility, Contributions, Rollovers & Transfers
Loni Porta, Convergent Retirement Plan Solutions, LLC

10/21/2025 **IRA Series:**
Traditional & Roth IRAs Part B: Distributions, Taxation, Withholding & Penalties
Loni Porta, Convergent Retirement Plan Solutions, LLC

11/17/2025 **IRA Series:**
Monday IRA Year-End Wrap Up: Hottest Issues, Compliance & Reporting Responsibilities
Loni Porta, Convergent Retirement Plan Solutions, LLC

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