



KANSAS BANKERS
ASSOCIATION

ACCOUNT DOCUMENTATION SEMINAR ONDEMAND

ABOUT EVENT

Bankers are continually challenged to provide great customer service and accurate information as new and innovative products are introduced in the marketplace. Too often, personnel are trained on how to open certain types of accounts and what documentation to request, but don't know the reasoning behind the policies and procedures. The KBA's Account Documentation program focuses on best practices all bank employees should exercise when establishing new accounts.

Pricing for OnDemand:

- ___ \$25 mil & under: \$400
- ___ \$26 mil to \$100 mil: \$500
- ___ \$101 mil to \$250 mil: \$600
- ___ \$251 mil to \$400 mil: \$800
- ___ \$401 mil to \$750 mil: \$1,000
- ___ \$751 mil to \$1 bil: \$1,300
- ___ Over \$1 billion: \$1,600
- ___ Associate Member: \$1,000
- ___ Non-Member: \$3,200

Please email completed form to Natalie Wareham at education@ksbankers.com or fax to 785-272-8392.

Name: _____

Bank: _____

Address: _____

State, Zip: _____

Email: _____



**TERRI D. THOMAS - EVP & COO- LEGAL
DEPARTMENT DIRECTOR, KBA**

Terri Thomas is KBA's Executive Vice President and Legal Department Director. Terri has over 40 years' experience in the banking industry and has been a popular instructor for KBA on a variety of compliance and legal issues. You will enjoy Terri's upbeat and relaxed teaching style.

TRAINING TOPICS:

- Jointly-owned accounts
- Payable-on-death accounts
- Business accounts
- Authorized signers and powers of attorney
- Funeral agreement accounts
- Informal association accounts
- Conservator/guardianships
- FDIC Insurance
- Trust accounts
- Children's accounts
- Social Security accounts
- Death of account owners

EDUCATION & CONFERENCES

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