KANSAS BANKERS ASSOCIATION

Controlling the Risks of Power of Attorney Documents - Best Practices for Kansas Bankers

FEBRUARY 18, 2025 - VIRTUAL

Kansas bankers are frequently required to complete transactions for customers involving Power of Attorney documents. To protect your institution's interests when using these documents, it is imperative to understand the basic do's and don'ts. This presentation will provide a detailed review of Kansas power of attorney laws, as well as the best practices to use when dealing with these complex legal documents. Special attention will be paid to the transactions that pose the greatest risks for financial institutions.

WHO SHOULD ATTEND:

Bank employees involved with opening new accounts, deposit or loan documentation, and operations, as well as bank attorneys, will find this webinar very useful.

Program Presenter

TERRI D. THOMAS, JD
EVP/COO, KANSAS BANKERS ASSOCIATION

With over 40 years of banking experience, Terri brings real world instruction delivered in an upbeat and relaxed style.

TOPICS INCLUDE:

- Relationships among the customer, the attorney-in-fact, and the financial institution
- Durable vs. non-durable Power of Attorney
- Determining if a Power of Attorney is general or limited
- Steps to protect your institution when relying on a Power of Attorney
- Language to look for in the Power of Attorney document when completing a transaction for the attorney-in-fact
- Power of Attorney revocation guidance
- Attorney-in-fact representations a financial institution can typically rely on
- Handling out-of-state Powers of Attorney

EDUCATION & CONFERENCES
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CONTROLLING THE RISKS OF POWER OF ATTORNEY DOCUMENTS -
BEST PRACTICES FOR KANSAS BANKERS

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Program Agenda

Program: 2:00 p.m. - 4:00 p.m.

Registration Information

ASSET SIZE	LIVE	ONDEMAND	BOTH
$25 mil & under	___ $150	___ $200	___ $250
$26 mil - $100 mil	___ $250	___ $300	___ $350
$101 mil - $250 mil	___ $350	___ $400	___ $450
$251 mil - $400 mil	___ $450	___ $500	___ $550
$401 mil - $750 mil	___ $550	___ $600	___ $650
$751 mil - $1 bil	___ $650	___ $700	___ $750
Over $1 billion	___ $750	___ $800	___ $850
Assoc. Members	___ $550	___ $600	___ $650
Non-members	___ $1,500	___ $1,600	___ $1,700

*Fee includes instruction, electronic manual via secured link and power point handout.
*We understand circumstances arise requiring cancellation. Once you receive the electronic confirmation and materials, there will be no refunds. There is no limit to the number of employees that can attend the virtual session from your institution. Please register using the COMPANY login ID and password when registering more than one individual. If you have more than one attending, please email Natalie Wareham at nwareham@ksbankers.com. No video or audio recording allowed.

Registrant name - ______________________ Job title - ______________________

Bank Location - ______________________ E-mail - ______________________

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Bank Location - ______________________ E-mail - ______________________

Registrant name - ______________________ Job title - ______________________

Bank Location - ______________________ E-mail - ______________________

Bank - ______________________ Total Attending - ______________________

PO Box - ______________________ Total Enclosed - ______________________

City, State, Zip - ______________________

Three ways to register:
1. Complete and mail registration form with payment.
2. Fax registration form, followed by mailing of payment. Please use this form as your invoice.
3. Register online at www.ksbankers.com.