



# ACCOUNT DOCUMENTATION SEMINARS

## April 7 & 21, 2026 - VIRTUAL

### 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.

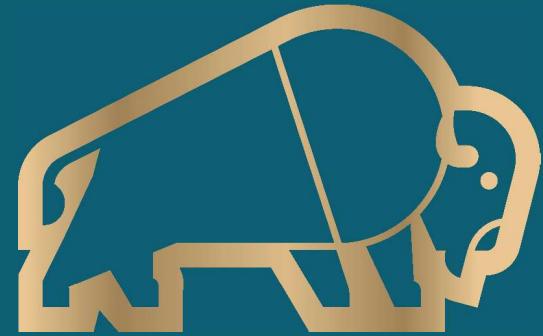
#### Who Should Attend

Attorneys and bankers will find this program beneficial.

Approved for 6.5 Kansas CLE credits.

#### The Manual

The Account Documentation manual will be available electronically via a secured link. All registrants will receive instructions on accessing the manual approximately one week prior to the selected seminar. Once the link has been shared with registrants, we will not be able to accept any cancellations to the seminars. If you are unable to attend, we will be happy to accept a substitution.



THIS TRAINING WILL BE PRESENTED BY  
THE KBA LEGAL SERVICES TEAM.

### 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

# 2026 ACCOUNT DOCUMENTATION SEMINARS

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## Program Agenda

Logon Begins - 8:30 a.m.  
Program - 9:00 a.m. - 12:00 p.m.  
Lunch 12:00 p.m. - 12:45 p.m.  
Program Continues: 12:45 p.m. - 4:30 p.m.

ASSET SIZE	LIVE	ONDEMAND	BOTH
\$25 mil & under	\$350	\$400	\$450
\$26 mil - \$100 mil	\$450	\$500	\$550
\$101 mil - \$250 mil	\$550	\$600	\$650
\$251 mil - \$400 mil	\$750	\$800	\$850
\$401 mil - \$750 mil	\$950	\$1,000	\$1,050
\$751 mil - \$1 bil	\$1,250	\$1,300	\$1,350
Over \$1 billion	\$1,550	\$1,600	\$1,650
Strategic Partners	\$950	\$1,000	\$1,050
Non-members	\$3,100	\$3,200	\$3,300

We understand circumstances arise requiring cancellation. Cancel up to five business days before the program and your registration will be refunded. There is no limit to the number of employees that can attend the virtual session from your institution. If more than two people from your bank are attending, please email [education@ksbankers.com](mailto:education@ksbankers.com).

Name: \_\_\_\_\_

Bank Location: \_\_\_\_\_ E-mail: \_\_\_\_\_

Please select the date you will attend: \_\_\_\_\_ April 7 \_\_\_\_\_ April 21

Name: \_\_\_\_\_

Bank Location: \_\_\_\_\_ E-mail: \_\_\_\_\_

Please select the date you will attend: \_\_\_\_\_ April 7 \_\_\_\_\_ April 21

Bank: \_\_\_\_\_

Total Enclosed: \$ \_\_\_\_\_ Total Attending: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

### Three ways to register:

1. Complete and mail the registration form with a check.
2. Email the registration form to [education@ksbankers.com](mailto:education@ksbankers.com), followed by payment via check by mail or credit card over the phone.
3. Register online using a credit card at [www.ksbankers.com](http://www.ksbankers.com).