2017 FINANCIAL SERVICE REPRESENTATIVE VIRTUAL CONFERENCE

October 17, 19, 24 & 26

Register by October 5th, 2017 for the bundle

CCUA
Canadian Credit Union Association

cuSource
Professional Development and Education

2017 FSR VIRTUAL CONFERENCE

October 17, 19, 24 and 26 | Register by October 5 for the bundle!

Financial Services Representatives (FSRs) hold a unique position within the credit union system as trusted advisors for a variety of products and services, ranging from loan to investment to transactional.

FSRs must understand and connect with members on a wide variety of topics and stay up to date on the many changes. 2017 marks the first year we're addressing these specific FSR challenges head on with subject matter experts who have the depth of knowledge and experience to make the FSR's learning experience as impactful as it can be. Together, we'll explore the importance of outbound sales calling and share ways to ensure you find your calling confidence. We'll look at the opportunities and challenges that are presented during member appointments. Then we'll flip our focus to risk. We'll explore the external environment and determine how to assist members reach their financial goals by managing line of credit (LOC) risks.

Join us for this years FSR Virtual Conference.

CCUA Canadian Credit Union Association | cuSource™ Professional Development and Education

WEBINAR DESCRIPTIONS

Outbound Calling for Sales

SESSION #1 – REGISTER BY OCTOBER 5

Changes in the way members access their funds has meant new challenges for teams that work in the branch. It's difficult, if not impossible to plan a face-to-face conversation with your member when they drop into the branch. Still, statistics show that credit union members do have products and services at other financial institutions. How do you convince them to bring the business to you? Easy, you create a call strategy and pick up the phone! Believe it or not, your members want to hear from someone they trust, and that person is you!

OCTOBER 17, 2017
1:00 - 2:15 PM ET

REGISTER NOW

Interview Skills for Sales

SESSION #2 – REGISTER BY OCTOBER 16

It happens often. You are meeting with a member who wants to open an account or apply for a loan. You've asked them questions about the financial products and services they have. They list a loan with one of the Big 5, and their investments are with another. You know it's best to ask about that business, but you're not completely comfortable starting the conversation. You don't want to seem too pushy. Join us for 75 minutes that will help you get the sales conversations flowing.

OCTOBER 19, 2017
1:00 - 2:15 PM ET

REGISTER NOW

Analyzing the External Environment for Risk

SESSION #3 – REGISTER BY OCTOBER 19

Identifying risk is something most FSRs are quite familiar with. Risk is a part of our business and there is no way to avoid it and stay in business. Join us for this 75-minute session where we'll explore the world outside our branch doors to ask what role the external environment plays in our risk analysis. We'll draw the lines between things like the provincial unemployment rate and member risk. We'll look at the connection between local industry and portfolio stability. And we'll discuss what may cause immediate versus long term concern for many credit unions. Finally, we'll talk about possible strategies for mitigating external risks.

OCTOBER 24, 2017
1:00 - 2:15 PM ET

REGISTER NOW

Line of Credit (LOC) Function and Annual Reviews for Risk

SESSION #4 – REGISTER BY OCTOBER 23

By definition, a line of credit is an amount of money we're willing to extend, on credit, to a member. We identify the maximum amount we're willing to extend, the price (or rate) they'll pay to use it, and how long we're willing to let them use it. What we don't stipulate however, is how the fund can be spent. For many members, the flexibility and freedom are positive. For some members, the flexibility and freedom are the start of bigger problems. In this 75-minute session we'll dig into the function of a line of credit (LOC) annual review. What you should be looking at and what you should be looking for! We'll show you how to spot risks and ensure your doing all you can to help members reach their financial goals.

OCTOBER 26, 2017
1:00 - 2:15 PM ET

REGISTER NOW

SPEAKER PROFILES

MARY JANE COPPS

An accomplished author, speaker and facilitator, Mary Jane Copps aims to improve communication at all levels. Her illustrious career found her on the end of the telephone as a manager, a journalist, a salesperson, a researcher and a fundraiser where she sharpened her customer service phone etiquette and interview skills.

Mary Jane has spent 27 years analyzing the psychology of a phone call, information she now shares with entrepreneurs, not-for-profits, corporations and government departments in her mission to improve telephone interactions between businesses and clients (and vice versa!). The Phone Lady also helps her clients deal with their phone phobia and get them on track to becoming effective communicators who turn every phone call they make into lasting business relationships.

LYDIA JOHNSON

After 32 years in banking, in roles from the teller line to the executive table, Lydia launched her consulting business, focusing on the Credit Union system in North America. She shares her experiences as a coach, trainer, presenter, and facilitator for a variety of business needs and covering a variety of topics.

Before her corporate departure in banking, and after 25 years with Vancity Credit Union, Lydia was a member of the Senior Leadership team, as SVP Sales & Service. Skills include sales, marketing, networking, operations and strategic planning and the oversight of the Retail business channel. In addition to her banking background, Lydia has been both a key note speaker as well as a conference presenter, over many years within Canada, the U.S., and internationally.

SPEAKER PROFILES (CONTINUED)

FELICITY RONAGHAN

Felicity has 25 years of experience in commercial lending, including over 15 years in risk management at Vancity Credit Union. As a Senior Risk Manager, she adjudicated loans ranging from $1,000 to over $10 million – sometimes in the same day! – to a wide variety of borrowers including not for profits, social enterprises, real estate developers and small businesses. Felicity has presented at conferences and provided coaching to social enterprises as part of Vancity's Each One, Coach One program.

Given how much she enjoyed training, coaching and mentoring in her risk management role, Felicity eagerly pursued an opportunity to make a formal move to the training and development area within Vancity. Her work as a Learning & Development consultant is very much informed by her strong technical skills and years of practical experience. She's at home in front of a classroom facilitating as well as at her computer keyboard developing case studies and webinars.

JOHN FERGUSON

John has spent over 30 years working in the financial services industry retiring in early 2006. Throughout those years he served in many capacities – loans & mortgages, small business lending, private banking, international, business development, training and 10 years as an Area Manager overseeing retail banking operations. He has also been teaching part-time at the local College since 2001 delivering management and finance courses.

John's education includes an undergraduate degree from St. Mary's University in Halifax, N.S. He has Personal Financial Planning designation as well as the Canadian Securities course. At age 45 he returned to school part-time at the University of Windsor and obtained his MBA. He enjoys training and his greatest satisfaction comes from seeing others succeed.

REGISTRATION & PRICING

Conference Bundle

Purchase a single seat in all 4 sessions. (Non-transferable, single employee only)

- **Corporate Members - $329 (per employee)**
- **Pay As You Go - $395 (per employee)**

REGISTER NOW FOR BUNDLES

Individual Webinars

Attend as many webinars as you'd like and register for each separately. Use the "register now" links on page 2 or search by title in the **Learning Gateway** to register.

- **Corporate Members - $89 (per webinar)**
- **Pay As You Go - $107 (per webinar)**

REGISTER NOW

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