

2020 OVERDRAFT PROGRAM TRAINING EVENTS

JMFA is pleased to offer both in-person and online learning opportunities exclusively for our clients. These comprehensive training events help participants deliver measurable results by taking overdraft program management to the next level — enhancing compliance knowledge, streamlined processes and improved service delivery.

JMFA ACADEMY

IN-PERSON EVENT: ADVANCED PROGRAM MANAGEMENT FOR OVERDRAFT PRIVILEGE

This two-day event provides participants with additional knowledge and education for managing their overdraft program. Moreover, the in-person program format offers a setting for peer interaction and small group discussions for solutions to real-world challenges related to overdraft program management strategies, compliance and account holder-related topics.

DATE	EVENT
2/26 - 2/27	Advanced Program Management for Overdraft Privilege for Credit Unions
3/9 - 3/10	Advanced Program Management for Overdraft Privilege for Banks
5/11 - 5/12	Advanced Program Management for Overdraft Privilege for Credit Unions
7/13 - 7/14	Advanced Program Management for Overdraft Privilege for Banks
9/21 - 9/22	Advanced Program Management for Overdraft Privilege for Credit Unions
10/19 - 10/20	Advanced Program Management for Overdraft Privilege for Credit Unions
11/2 - 11/3	Advanced Program Management for Overdraft Privilege for Banks
12/7 - 12/8	Advanced Program Management for Overdraft Privilege for Banks

**Upon completion, industry professionals can receive up to nine hours of CPE credit toward maintaining personal certifications*
***All JMFA Academy events are held at our Training Facility in Houston, Texas*

PLEASE VISIT JMFA.COM/ACADEMY TO LEARN MORE ABOUT THE JMFA ACADEMY PROGRAM.

PRIVILEGE MANAGER CRM® WEBINAR SERIES

THE SERIES INCLUDES 5 WEEKLY WEBINARS THAT WILL TAKE PLACE ONCE PER QUARTER FROM 2-3 PM CST.

Winter

1/22 Get to Know the New Privilege Manager CRM®
1/29 Letter Generation
2/5 Calls
2/12 Charge Offs & Recoveries
2/19 Reporting

Spring

4/15 Get to Know the New Privilege Manager CRM®
4/22 Letter Generation
4/29 Calls
5/6 Charge Offs & Recoveries
5/13 Reporting

Summer

7/1 Get to Know the New Privilege Manager CRM®
7/8 Letter Generation
7/15 Calls
7/22 Charge Offs & Recoveries
7/29 Reporting

Fall

9/30 Get to Know the New Privilege Manager CRM®
10/7 Letter Generation
10/14 Calls
10/21 Charge Offs & Recoveries
10/28 Reporting

For additional information about client events, or should you require different dates to accommodate your schedule, please contact Melanie Swift at **832-390-2192**.

GO TO: WWW.JMFA.COM/CLIENTEVENTS TO REGISTER

Schedule is subject to change. For the most current list of events and programs, please visit jmfa.com/clientevents.

Sept 2019

WEBINARS

GO TO: WWW.JMFA.COM/CLIENTEVENTS TO REGISTER

WEBINAR: EXTENDED COVERAGE WORKSHOP

This webinar is designed to help ensure your account holders have all the information needed to decide whether Extended Overdraft Privilege is right for them. Key discussion items include:

- What is Regulation E and how it pertains to Overdraft Privilege
- Defining Extended Coverage and what it means to account holders
- Compliance issues related to discussing Extended Coverage with account holders
- Helping account holders understand their overdraft protection options
- Approaching account holders about Extended Coverage and overcoming objections
- Explaining to account holders the impact of not accepting Extended Coverage
- Understanding the impact of Unauthorized Overdrafts for your institution

**All programs are scheduled at Central Time (CT) and registration is required for all events*

DATE	TIME	EVENT
1/28	9 - 10 a	Extended Coverage Workshop for Banks
1/28	11 a - 12 p	Extended Coverage Workshop for Credit Unions
1/28	1 - 2 p	Extended Coverage Workshop for Banks
1/28	3 - 4 p	Extended Coverage Workshop for Credit Unions
3/19	9 - 10 a	Extended Coverage Workshop for Credit Unions
3/19	11 a - 12 p	Extended Coverage Workshop for Banks
3/19	1 - 2 p	Extended Coverage Workshop for Credit Unions
3/19	3 - 4 p	Extended Coverage Workshop for Banks
5/5	9 - 10 a	Extended Coverage Workshop for Banks
5/5	11 a - 12 p	Extended Coverage Workshop for Credit Unions
5/5	1 - 2 p	Extended Coverage Workshop for Banks
5/5	3 - 4 p	Extended Coverage Workshop for Credit Unions
7/9	9 - 10 a	Extended Coverage Workshop for Banks
7/9	11 a - 12 p	Extended Coverage Workshop for Credit Unions
7/9	1 - 2 p	Extended Coverage Workshop for Banks
7/9	3 - 4 p	Extended Coverage Workshop for Credit Unions
9/15	9 - 10 a	Extended Coverage Workshop for Credit Unions
9/15	11 a - 12 p	Extended Coverage Workshop for Banks
9/15	1 - 2 p	Extended Coverage Workshop for Credit Unions
9/15	3 - 4 p	Extended Coverage Workshop for Banks
11/12	9 - 10 a	Extended Coverage Workshop for Banks
11/12	11 a - 12 p	Extended Coverage Workshop for Credit Unions
11/12	1 - 2 p	Extended Coverage Workshop for Banks
11/12	3 - 4 p	Extended Coverage Workshop for Credit Unions

WEBINAR: TRACKING DOCUMENT REVIEW WORKSHOP FOR JMFA OVERDRAFT PRIVILEGE® CLIENTS

In this session, program implementation experts work with participants one-on-one to review key components of individual program tracking reports from Fast-Track. By the end of this workshop attendees will be able to identify specific areas for program improvement that can be implemented right away. Registration is limited for each session to allow ample time to address the various aspects of performance indicators, similarities and differences among industry peers and Q&A. The session provides a unique learning environment for improving program management.

**All programs are scheduled at Central Time (CT) and registration is required for all events*

For additional information about client events, or should you require different dates to accommodate your schedule, please contact Melanie Swift at 832-390-2192.

DATE	TIME	EVENT
2/13	9 - 10:30 a	Tracking Document Review Workshop for Banks
2/13	11 a - 12:30 p	Tracking Document Review Workshop for Credit Unions
2/13	1 - 2:30 p	Tracking Document Review Workshop for Banks
2/13	3 - 4:30 p	Tracking Document Review Workshop for Credit Unions
4/9	9 - 10:30 a	Tracking Document Review Workshop for Credit Unions
4/9	11 a - 12:30 p	Tracking Document Review Workshop for Banks
4/9	1 - 2:30 p	Tracking Document Review Workshop for Credit Unions
4/9	3 - 4:30 p	Tracking Document Review Workshop for Banks
6/11	9 - 10:30 a	Tracking Document Review Workshop for Banks
6/11	11 a - 12:30 p	Tracking Document Review Workshop for Credit Unions
6/11	1 - 2:30 p	Tracking Document Review Workshop for Banks
6/11	3 - 4:30 p	Tracking Document Review Workshop for Credit Unions
8/13	9 - 10:30 a	Tracking Document Review Workshop for Credit Unions
8/13	11 a - 12:30 p	Tracking Document Review Workshop for Banks
8/13	1 - 2:30 p	Tracking Document Review Workshop for Credit Unions
8/13	3 - 4:30 p	Tracking Document Review Workshop for Banks
10/8	9 - 10:30 a	Tracking Document Review Workshop for Banks
10/8	11 a - 12:30 p	Tracking Document Review Workshop for Credit Unions
10/8	1 - 2:30 p	Tracking Document Review Workshop for Banks
10/8	3 - 4:30 p	Tracking Document Review Workshop for Credit Unions