JMFA

Four Letters. Infinite Potential.

2021 OVERDRAFT PROGRAM WEBINAR TRAINING EVENTS

JMFA is pleased to offer 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.

WEBINAR: EXTENDED COVERAGE WORKSHOP (60 MINUTES)

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

DATE	TIME	EVENT
1/19	9 am & 1 pm	Extended Coverage Workshop for Credit Unions
1/19	11 am & 3 pm	Extended Coverage Workshop for Banks
3/18	9 am & 1 pm	Extended Coverage Workshop for Banks
3/18	11 am & 3 pm	Extended Coverage Workshop for Credit Unions
5/11	9 am & 1 pm	Extended Coverage Workshop for Credit Unions
5/11	11 am & 3 pm	Extended Coverage Workshop for Banks
7/15	9 am & 1 pm	Extended Coverage Workshop for Banks
7/15	11 am & 3 pm	Extended Coverage Workshop for Credit Unions
9/21	9 am & 1 pm	Extended Coverage Workshop for Credit Unions
9/21	11 am & 3 pm	Extended Coverage Workshop for Banks
11/18	9 am & 1 pm	Extended Coverage Workshop for Banks
11/18	11 am & 3 pm	Extended Coverage Workshop for Credit Unions

Who should attend? Overdraft Privilege Administrators, Overdraft Privilege Managers, tellers, account service representatives, contact center specialists, branch managers, training staff, and front line team members.

WEBINAR: OVERDRAFT PRIVILEGE COMMUNICATION WORKSHOP (60 MINUTES)

As a complement to our full-length training, this program reinforces essential principles to improve communication and help overcome challenges when it comes to explaining the program to account holders. Key discussion items include:

- The difference between Standard Coverage and Extended Coverage
- How to effectively communicate Overdraft Privilege using specific, compliant and non-lending words and phrases
- Six simple key discussion points when explaining Overdraft Privilege and Regulation E
- What key phrases are best to use for starting a conversation about Extended Coverage
- How to overcome the challenge of answering difficult questions
- Ways to handle objections positively

DATE	TIME	EVENT
1/28	9 am & 1 pm	ODP Comm. Workshop for Banks
1/28	11 am & 3 pm	ODP Comm. Workshop for Credit Unions
3/25	9 am & 1 pm	ODP Comm. Workshop for Credit Unions
3/25	11 am & 3 pm	ODP Comm. Workshop for Banks
5/20	9 am & 1 pm	ODP Comm. Workshop for Banks
5/20	11 am & 3 pm	ODP Comm. Workshop for Credit Unions
7/22	9 am & 1 pm	ODP Comm. Workshop for Credit Unions
7/22	11 am & 3 pm	ODP Comm. Workshop for Banks
9/28	9 am & 1 pm	ODP Comm. Workshop for Banks
9/28	11 am & 3 pm	ODP Comm. Workshop for Credit Unions
11/23	9 am & 1 pm	ODP Comm. Workshop for Credit Unions
11/23	11 am & 3 pm	ODP Comm. Workshop for Banks

Who should attend? Overdraft Privilege Administrators, tellers, account service representatives, contact center specialists, branch managers, training staff, and front line team members.

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

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

12/2020

ONGOING TRAINING TO ACHIEVE CONSISTENT RESULTS.

VISIT WWW.JMFA.COM/CLIENTEVENTS TO REGISTER

WEBINAR: TRACKING DOCUMENT REVIEW WORKSHOP (90 MINUTES)

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.

DATE	TIME	EVENT
2/11	9 am & 1 pm	Tracking Doc. Rev. Workshop for Credit Unions
2/11	11 am & 3 pm	Tracking Doc. Rev. Workshop for Banks
4/8	9 am & 1 pm	Tracking Doc. Rev. Workshop for Banks
4/8	11 am & 3 pm	Tracking Doc. Rev. Workshop for Credit Unions
6/10	9 am & 1 pm	Tracking Doc. Rev. Workshop for Credit Unions
6/10	11 am & 3 pm	Tracking Doc. Rev. Workshop for Banks
8/12	9 am & 1 pm	Tracking Doc. Rev. Workshop for Banks
8/12	11 am & 3 pm	Tracking Doc. Rev. Workshop for Credit Unions
10/14	9 am & 1 pm	Tracking Doc. Rev. Workshop for Credit Unions
10/14	11 am & 3 pm	Tracking Doc. Rev. Workshop for Banks

Who should attend? Overdraft Privilege Managers, Overdraft Privilege Administrators, Collections, Staff with day-to-day responsibilities with the program.

WEBINAR SERIES: KEY ASPECTS OF PRIVILEGE MANAGER CRM®

This five-part webinar series will cover important features and functions of the software. Each session will focus on a different topic. In these interactive web sessions, you'll learn about the important features and functions of the software such as an overview of the software and new features, Letter Generation, Calls, Charge-Offs & Recoveries, and Reporting.

- **Get to Know the New Privilege Manager CRM®** – Find out the latest enhancements and upgrades including how to navigate, search for accounts, and find detailed information in the account history.
- **Letter Generation** – Learn the basics of generating letters, how to review pending letters, how to use the Letters on Demand feature, advanced letter scheduling options, and new Cloud-based email and text functions.
- **Calls** – Uncover the latest updates of new call functionalities, including advanced filtering to unlock greater efficiencies.
- **Charge Offs & Recoveries** – This session provides an overview of how to charge off accounts correctly, including step-by-step instructions for updating data across the core, and your GL.
- **Reporting** – Uncover everything you need to know about the various key management reports available, including how to run reports, use filters and more

DATE	TIME	EVENT
3/3	2 pm - 3 pm	Part 1: Get to Know Privilege Manager CRM®
3/10	2 pm - 3 pm	Part 2: Letter Generation
3/17	2 pm - 3 pm	Part 3: Calls
3/24	2 pm - 3 :15 pm	Part 4: Charge Offs - Recoveries
3/31	2 pm - 3:30 pm	Part 5: Reporting
6/2	2 pm - 3 pm	Part 1: Get to Know Privilege Manager CRM®
6/9	2 pm - 3 pm	Part 2: Letter Generation
6/16	2 pm - 3 pm	Part 3: Calls
6/23	2 pm - 3 :15 pm	Part 4: Charge Offs - Recoveries
6/30	2 pm - 3:30 pm	Part 5: Reporting
10/6	2 pm - 3 pm	Part 1: Get to Know Privilege Manager CRM®
10/13	2 pm - 3 pm	Part 2: Letter Generation
10/20	2 pm - 3 pm	Part 3: Calls
10/27	2 pm - 3 :15 pm	Part 4: Charge Offs - Recoveries
11/3	2 pm - 3:30 pm	Part 5: Reporting

Who should attend? Overdraft Privilege Managers, Overdraft Privilege Administrators, Collections, any users of the software or staff with day-to-day responsibilities with the program.

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

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