



# Consumer Lending School

March 12-15, 2018 • Columbia, SC

## Agenda

### Monday, March 12

- 8:30 – 9:00 a.m. Registration & Morning Refreshments
- 9:00 – 9:25 a.m. Pre-Test
- 9:25 – 10:30 a.m. **The Role of Credit & Function of Policy**  
*John Radebaugh, CEO, Carolinas Credit Union League*
- 10:30 – 10:45 a.m. Break
- 10:45 – 12:15 p.m. **Ratio Analysis for the Lending Professional**  
*Scott Conley, CEO, Mid-Carolina Credit Union*
- 12:15 – 1:15 p.m. Lunch
- 1:15 – 2:45 p.m. **Key Laws & Regulations: Truth-in-Lending**  
*Todd Sherpy, Sherpy & Jones Law Firm*
- 2:45 – 3:00 p.m. Break
- 3:00 – 4:15 p.m. **Document Preparation & Processing**  
*Todd Sherpy, Sherpy & Jones Law Firm*

### Tuesday, March 13

- 8:30 – 9:00 a.m. Morning Refreshments
- 9:00 – 10:15 a.m. **Practical Communications & Sales Skills for the Lending Professional**  
*Todd Harms, Speaker*
- 10:15 – 10:30 a.m. Break
- 10:30 a.m. – 12:00 p.m. **Practical Communications & Sales Skills for the Lending Professional**  
*Todd Harms (continued)*
- 12:00 – 1:00 p.m. Lunch
- 1:00 – 2:15 p.m. **An Introduction to Basic Financial Counseling**  
*Mary Wilson, Speaker*
- 2:15 – 2:30 p.m. Break

## **Tuesday, March 13 (continued)**

2:30 – 4:00 p.m.            **An Introduction to Basic Financial Counseling**  
*Mary Wilson (continued)*

4:00 – 4:30 p.m.            Pre-Test Review

## **Wednesday, March 14**

9:00 – 9:30 a.m.            Morning Refreshments

9:30 – 10:45 a.m.          **Key Concepts of Collection & Bankruptcy Law for Loan Officers**  
*Christy Jones, Sherpy & Jones Law Firm*

10:45 – 11:00 a.m.        Break

11:00 – 12:30 p.m.        **Key Concepts of Collection & Bankruptcy Law for Loan Officers**  
*Christy Jones (continued)*

12:30 – 1:30 p.m.        Lunch

1:30 – 2:45 p.m.          **What's Next for Lending?**  
*Steve Wichmann, EVP/COO, Heritage Trust Federal Credit Union*

2:45 – 3:00 p.m.        Break

3:00 – 4:00 p.m.        Test Review / Study Hall

5:30 p.m.                  Group Dinner

## **Thursday, March 15**

9:00 – 9:15 a.m.        Morning Refreshments

9:15 – 11:15 a.m.        **Key Laws & Regulations, FCRA & ECOA**  
*Christy Jones, Sherpy & Jones Law Firm*

11:15 – 11:30 a.m.        Break

11:30 – 1:00 p.m.        **Using Credit Reports to Your Advantage**  
*Rachel Keller, Experian*  
*John Shealy, TransUnion*  
*Linda Moynihan Vance, Innovative Solutions Group*

1:00 – 1:45 p.m.        Lunch

1:45 – 2:00 p.m.        Study and Review Session

2:00 – 2:30 p.m.        Final Test & School Evaluations

2:30 – 3:45 p.m.        **Finding, Serving, & Winning with Consumers in the Digital Lending World**  
*Sundeep Kapur, Educator, Digital Credence*

3:45 – 4:00 p.m.        Graduation Certificates