



Consumer Lending School

March 18-21, 2019 • Columbia, SC

Agenda

Monday, March 18

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| 8:30 – 8:45 a.m. | Registration & Morning Refreshments |
| 8:45 – 9:10 a.m. | Pre-Test |
| 9:15 – 10:45 a.m. | Key Lending Strategies for Growth, Profitability & Retention
<i>Celeste Cook, cuStrategies, LLC</i> |
| 10:45 – 11:00 a.m. | Break |
| 11:00 – 12:30 p.m. | Credit Scoring Analysis & Risk Assessments
<i>Celeste Cook, cuStrategies, LLC</i> |
| 12:30 – 1:30 p.m. | Lunch |
| 1:30 – 3:00 p.m. | Practical Communication & Sales Skills for the Lending Professional
<i>Todd Harms, Speaker</i> |
| 3:00 – 3:15 p.m. | Break |
| 3:15 – 4:30 p.m. | Practical Communication & Sales Skills for the Lending Professional
<i>Todd Harms, Speaker (continued)</i> |

Tuesday, March 19

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| 8:30 – 9:00 a.m. | Morning Refreshments |
| 9:00 – 10:30 a.m. | Key Laws & Regulations: Truth-in-Lending
<i>Todd Sherpy, Sherpy & Jones Law Firm</i> |
| 10:30 – 10:45 a.m. | Break |
| 10:45 a.m. – 12:00 p.m. | Document Preparation & Processing
<i>Todd Sherpy, Sherpy & Jones Law Firm</i> |
| 12:00 – 1:00 p.m. | Lunch |
| 1:00 – 2:15 p.m. | An Introduction to Basic Financial Counseling
<i>Mary Wilson, Speaker</i> |
| 2:15 – 2:30 p.m. | Break |

Tuesday, March 19 (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 20

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 – 3:30 p.m. **Key Laws & Regulations, FCRA & ECOA**
Christy Jones, Sherpy & Jones Law Firm

3:30 – 3:40 p.m. Break

3:40 – 4:15 p.m. Test Review / Study Hall

Thursday, March 21

9:00 – 9:15 a.m. Morning Refreshments

9:15 – 10:30 a.m. **Ratio Analysis for the Lending Professional**
LaTasha Cooper, Carolinas Credit Union League

10:30 – 10:45 a.m. Break

10:45 – 12:00 p.m. **Your Top Seven Drivers of Success**
Sundeep Kapur, Educator, Digital Credence

12:00 – 12:45 p.m. Lunch

12:45 – 1:00 p.m. Study and Review Session

1:00 – 1:45 p.m. Final Test & School Evaluations

2:00 – 3:15 p.m. **Finding, Serving, & Winning with Consumers in the Digital Lending World**
Sundeep Kapur, Educator, Digital Credence

3:25 – 4:00 p.m. Graduation Certificates