



## WEDNESDAY, MARCH 4<sup>TH</sup>

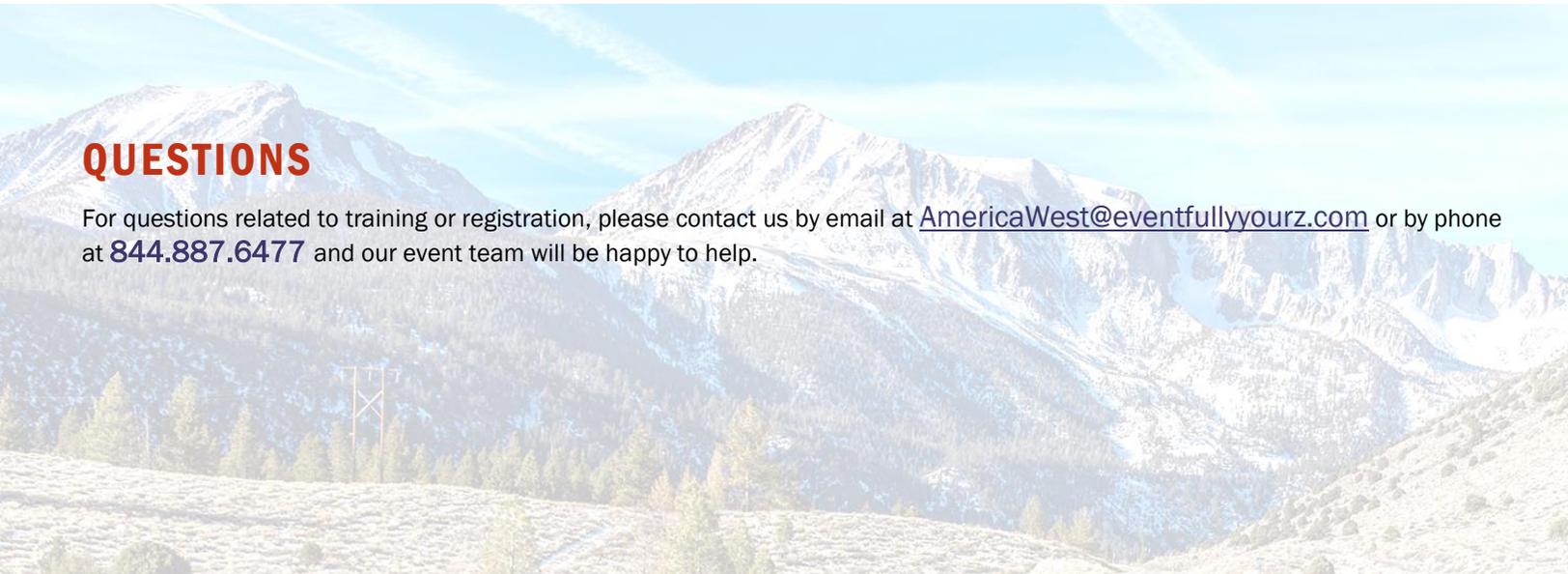
2:00-4:30 pm	Description
Everything you Need to Know about SBA Compliance & Staying within the White Lines - A Strategy for SBA Lending	<p>A 2 1/2 hour workshop presented by Chuck Evans of Capital Growth Solutions. Training will take place at Zions Headquarters in downtown Salt Lake City.</p> <p><i>This optional pre-conference training can be added to your training registration for just \$49.</i></p>

## THURSDAY, MARCH 5<sup>TH</sup>

All workshops below are included with the cost of your training registration.

10:30 - 11:45 am	
Creating Processes that Improve Customer Service and Manage Expectations	<p>Navigating the commercial lending process can be daunting, especially for an inexperienced borrower. Managing expectations while providing high customer service can be a tightwire act, especially if you do not have process a in place that will help you get to the finish line. This session will dive into setting up those processes that will alleviate hiccups and delays during the loan process.</p> <p><u>Who should attend:</u> Managers, Loan Officers, BDOs, Assistants, and Underwriters</p>
Building a Sustainable Loan Program	<p>Only close a few SBA loans a year? Want to know how to make participating in SBA lending profitable and sustainable? Our presenters will give to the tips and tricks to make your loan program successful. This is geared towards smaller banks, credit unions, and non-bank SBA lenders.</p> <p><u>Who should attend:</u> Managers, BDOs</p>
Closing Due Diligence & Documentation	<p>Documenting and closing SBA loans can leave you banging your head against the wall and frazzled. Come join our presenters from all aspects of the closing process and learn how to make this task less cumbersome and frustrating. They will answer your questions and go over best practices, including tips and tricks for making the closing easier.</p> <p><u>Who should attend:</u> Closers, Underwriters, Managers, Servicing Staff</p>
Business Valuations – Get your Questions Answered	<p>Lenders need to understand the basic and advanced skills required for successful business valuations to avoid screenouts and allow applications to progress smoothly and seamlessly. In this training, we will cover SBA's rules and requirements, critical areas of the business valuation process, and how to build a more robust internal valuation practice. Your burning questions on the who, when, and why of business valuations will be answered by our presenters.</p> <p><u>Who should attend:</u> Underwriters, Loan Officers, Managers</p>

<p>Underwriting Hot Topics and Best Practices</p>	<p>When underwriting a commercial loan, the financial analysis is critical to the credit determination and approval of a loan request. As they say, “Cash Flow is King.” But what about those more difficult to underwrite and complicated projects, what key things should be addressed in the analysis? Our presenters will hit the hot topics including projection analysis, feasibility, global cash flow, personal cash flow, and special industries.</p> <p><u>Who should attend:</u> Loan Officers, Credit Managers, Underwriters</p>
<p>Don't be Afraid of the 1502 – Servicing your 7(a) Loans</p>	<p>The 1502 report can be a four letter word – let our presenters walk you through the reporting process and servicing aspects of your 7(a) loan portfolio. They will walk you through the process and alleviate your fears.</p> <p><u>Who should attend:</u> Managers, Servicing Staff</p>



## QUESTIONS

For questions related to training or registration, please contact us by email at [AmericaWest@eventfullyyourz.com](mailto:AmericaWest@eventfullyyourz.com) or by phone at **844.887.6477** and our event team will be happy to help.

## AMERICA WEST: Salt Lake City Steering Committee

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