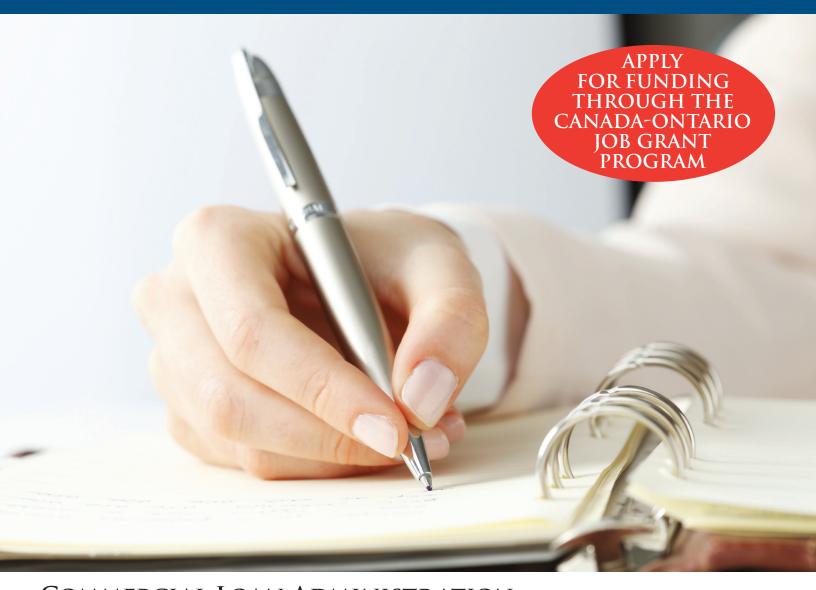
2015 COMMERCIAL LOAN ADMINISTRATION CLINIC



COMMERCIAL LOAN ADMINISTRATION is a key contributing factor in every successful and profitable commercial loan department. By diligently following policies, procedures and processes in an efficient, well organized way Commercial Loan Administrators become the foundation for building a strong commercial portfolio. The two day clinic is a rigourous, practical approach training session that will expand your knowledge, give you the tools and skills you need to perform the required tasks. You will gain in-depth understanding of the commercial loan administration process Participants gain insight through real-life commercial loan scenarios.

June 3rd & 4th, 2015 • Hilton Garden Inn, Mississauga



COMMERCIAL LOAN ADMINISTRATION CLINIC



WHO SHOULD ATTEND

This clinic is best suited for commercial loan administrators wishing to refresh their skills and knowledge and/or those who have not had the benefit of formal training. It is also designed for employees wishing to move into this important role or those providing temporary or back up support to this critical area.

FACILITATOR – PAULA-JEAN LYN

7:30 - 8:30 am

Paula-Jean has more than 25 years senior management experience in the areas of commercial credit administration, branch operations and cash management. She has held senior level positions including Commercial Credit Administration Manager at CitiBank, Jamaica and Commercial Credit Administrator at Central1 and Community Partners Inc. Paula-Jean provides commercial credit administration consulting to several Ontario credit unions and provides management support to several community cooperatives. She is recognized as an outstanding instructor and has taught the Commercial Loan Administration course which was previously offered at Professional Credit Granting School.

DAY 1 – WEDNESDAY, JUNE 3RD, 2015

7:30 – 8:30 am	Welcome and Introductions Introduction and Process Overview The Commercial Lending Department – Loans Origination and Credit Administration Personal vs Commercial Loans		
8:45 – 10:15 am			
10:15 – 10:30 am	Nutrition Break		
10:30 – 12:00 pm	 Commercial Lending Criteria Types of Commercial Credit Facilities Elements of a Contract The Commitment Letter including: Commitment Letter Schedules Standard Charge Terms 		
12:00 – 1:00 pm	Lunch		
1:00 – 2:30 pm	 Legal Representation and Legal Instructions Security Introduction Property vs Real Property Land Registry and the PPSA 		
2:30 – 2:45 pm	Nutrition Break		
2:45 – 4:30 pm	Conditions Precedent to Funding • Appraisals • Environmental Reports • PNW Statements and Financial Statements		
6:00 – 8:00 pm	Dinner		

DAY 2 – THURSDAY, JUNE 4TH, 2015

Breakfast

/:30 – 8:30 am	Dreakrast		
8:45 – 10:15 am	Brief Overview of Construction LendingThe Closing ProcessGroup Case Study		
10:15 – 10:30 am	Nutrition Break		
10:30 – 12:00 pm	Overview of Syndicated Loans The loan servicing agreement Participation agreement		
12:00 - 1:00 pm	Lunch		
1:00 – 2:30 pm	The Credit FileMonitoring ToolsCredit Administration Diary		
2:30 – 2:45 pm	Nutrition Break		
2:45 – 3:30 pm	Form Letters • Statutory Claims • Security Evaluation • Letters of Credit & PPSA		
3:30 – 4:00 pm	Closing		

COMMERCIAL LOAN ADMINISTRATION CLINIC

DATES:

Wednesday, June 3rd, 2015 - Thursday, June 4th, 2015

TIME:

8:45 AM to 4:30 PM

REGISTRATION FEE + MEETING PACKAGE

\$750.00 + HST = \$847.50 + \$177.20 + HST = \$1,047.74

FEES INCLUDE:

2 Continental Breakfasts, 2 lunches, 4 nutrition breaks, 1 dinner.

Note: Rooms are available at a corporate rate of \$139.00 plus applicable taxes.

LOCATION:

Hilton Garden Inn Toronto Airport West

1870 Matheson Blvd. Mississauga, ON L4W 0B3 Telephone: 905-361-6300

Contact the hotel directly if a room is required.



TO REGISTER:

Return the completed registration form to: Jan Hall, National Training Coordinator

Level Five Strategic Partners Inc. 27-4444 Eastgate Parkway, Mississauga, ON L4W 4T6 Telephone: 905-602-0644 Ext. 0

Fax: 905-602-0063

COMMERCIAL LOAN ADMINISTRATION CLINIC – REGISTRATION FORM

Name:		
Credit Union:		
Current Job Title:		
Address:		
	Postal Code:	
Telephone:	Fax:	
Email Address:		
Cheque Enclosed: \$		

strategic partners inc

Please make cheque payable to Level Five Strategic Partners Inc.