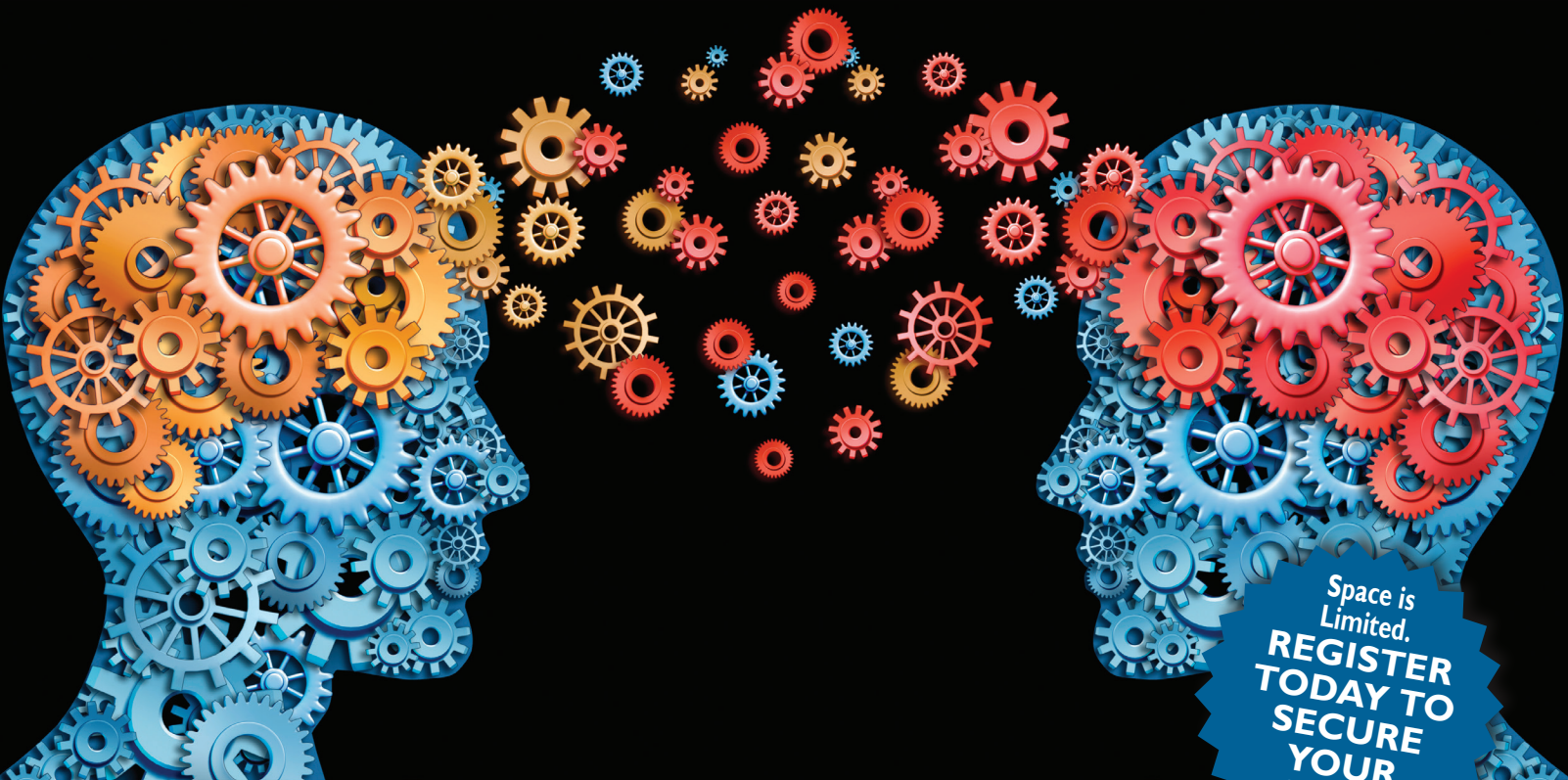


# 7TH ANNUAL COMMERCIAL LENDING KNOWLEDGE EXCHANGE 2015

The Commercial Lending Knowledge Exchange is the only session of its kind specifically for Ontario credit union commercial lenders. It offers an opportunity to engage in subject specific discussions with your peers, share knowledge, experiences and strategies in a challenging, supportive and open environment. The networking element provides as much value as the sessions themselves.



Space is  
Limited.  
**REGISTER  
TODAY TO  
SECURE  
YOUR  
SPOT!**

## WHO SHOULD ATTEND

All credit union commercial/business lenders including those responsible for managing a commercial portfolio.

**THE KNOWLEDGE EXCHANGE IS NOT A CONFERENCE, COURSE OR SEMINAR BUT IS THE MOST EFFECTIVE WAY TO EXPAND YOUR KNOWLEDGE AND BUILD A PEER NETWORK.**

NOVEMBER 4, 5, 6, 2015 • KINGBRIDGE CONFERENCE CENTRE, KING CITY, ON L7B 1A3

# COMMERCIAL LENDING KNOWLEDGE EXCHANGE 2015

## WEDNESDAY, NOVEMBER 4TH, 2015

4:00 – 5:30 pm	Registration
5:30 – 7:00 pm	Reception
7:00 – 9:00 pm	Networking Dinner
9:00 – 10:00 pm	Networking Cocktails

## THURSDAY, NOVEMBER 5TH, 2015

7:30 – 9:00 am	Networking Breakfast
9:00 – 10:00 am	Welcome/Opening Remarks
10:00 – 11:00 am	<b>Commercial Lending Department HR Challenges</b> <i>What does a 'Best Practices' Succession Plan really look like?</i> <ul style="list-style-type: none"><li>• What are the Key Person Risks?</li><li>• Where and how do you attract experienced and knowledgeable commercial lenders from outside the credit union system?</li><li>• What are the significant stumbling blocks?</li><li>• Roles and responsibilities within the Commercial Lending Department</li></ul>
11:00 – 12:00 pm	Open Knowledge Exchange
12:00 – 1:00 pm	Networking Lunch
1:00 – 2:00 pm	<b>Randy Tanaka</b> , President Level Five Strategic Partners Inc. <b>Pricing Commercial Deals in a Competitive Market</b> <ul style="list-style-type: none"><li>• Are banks re-entering our commercial lending market with a more aggressive approach?</li><li>• What can credit unions do to stay in the game?</li><li>• What can the commercial lending department do to offset shrinking spreads and retain the deals?</li><li>• Geographical challenges</li></ul>
2:00 – 4:00 pm	Open Knowledge Exchange
6:30 – 9:00 pm	Networking Dinner

## FRIDAY, NOVEMBER 6TH, 2015

7:30 – 9:00 am	Networking Breakfast
9:00 – 10:00 am	<b>Stages of Commercial Loan Deterioration</b> <i>Watchlist</i> <ul style="list-style-type: none"><li>• Advantages</li><li>• Annual Reviews</li><li>• <i>Impaired Loans</i><ul style="list-style-type: none"><li>• Working with the member....or not</li><li>• Analyzing what went wrong</li></ul></li><li>• <i>Bad and Doubtful</i></li><li>• Communication with the executive team, board of directors and the Regulator</li><li>• Staffing Levels</li></ul>
10:00 – 10:30 am	Open Knowledge Exchange
11:00 – 11:30 am	Knowledge Exchange Wrap Up
11:30 am	<b>Closing Remarks</b>
12:00 pm	Networking Lunch

**THIS IS YOUR EXCHANGE SO BRING ISSUES THAT ARE IMPORTANT TO YOU!**



### DATE:

November 4th, 5th and 6th, 2015 (session ends at 1:00 pm)

### LOCATION:

#### Kingbridge Conference Centre

12750 Jane Street, King City (Toronto), Ontario L5B 1A3

Telephone: 1-800-827-7221

### MEETING/HOTEL ACCOMMODATION PACKAGE:

**\$616.00 + taxes = \$696.08**

*Your package costs include: 2 nights single accommodation, high speed wireless internet, 2 full breakfasts, 2 buffet lunches, 2 dinners and continuous nutrition breaks, free parking and use of all facilities.*

### KNOWLEDGE EXCHANGE REGISTRATION FEE:

**\$750.00 + HST = \$847.50**

Make cheque payable to Level Five Strategic Partners Inc. in the amount of **\$1,543.58**

For more information contact:

**Candis Mirtl** at 1-888-311-3030 ext. 236

or [cmirtl@levelfive.ca](mailto:cmirtl@levelfive.ca)

## REGISTRATION FORM - 2015 COMMERCIAL LENDING KNOWLEDGE EXCHANGE

Name & Position: \_\_\_\_\_

\_\_\_\_\_

Name of Credit Union: \_\_\_\_\_

\_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_ Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email Address: \_\_\_\_\_

 **LEVELFIVE**  
strategic partners inc.  
[www.levelfive.ca](http://www.levelfive.ca)