

LOAN DOCUMENTATION ~ A HANDS-ON APPROACH

FACILITATED BY DAVID OSBURN

DENVER
THURSDAY, JUNE 17, 2010
9:00 a.m. to 4:00 p.m.
Sterner Training Center, 1009 Grant Street

Participants in this **NEW** one-day Loan Documentation program will receive a unique opportunity to review loan documents by working through a variety of case studies. The program will begin with a thorough overview of commercial lending requirements and loan documentation. Basic "business" structure will be presented along with loan "structure" and loan "support." Additionally, "conventional" commercial and SBA lending issues relative to loan documentation will be reviewed. Loan pricing and monitoring will also be covered along with a brief review of compliance issues.

During the second half of the seminar the attendees will be split into teams to analyze three (3) comprehensive case studies. Each team will be asked to review their cases for loan structure and documentation, and present their findings and errors to the group.

COURSE OBJECTIVES:

1. An introduction to loan documentation
2. Review of basic business structure
3. Explore the six (6) elements of loan structure
4. Summarize the four (4) elements of loan support
5. Highlight current "conventional" commercial and SBA lending issues
6. Discuss loan pricing and monitoring issues
7. Review compliance issues
8. Analyze comprehensive loan structure/documentation within several case studies

WHO SHOULD ATTEND?

This NEW program is designed for new and experienced documentation administrators, loan processors and assistants, loan officers, as well as management trainees.

DAVID OSBURN is the founder and managing member of David L. Osburn & Associates LLC, a Las Vegas-based business training and contract CFO firm that provides seminar/keynote speeches for various groups including CPAs, bankers, attorneys, credit union employees, credit managers, trade groups, and business owners. David's extensive professional background encompasses over 24 years in banking, finance, and marketing. His bank commercial lending credentials include comprehensive loan underwriting, management, customer development, and loan work-out experience.

\$250* Member Early / \$275* Member Regular

**REGISTER ONE PERSON AT THE ADVERTISED TUITION PRICE (EARLY OR REGULAR),
RECEIVE A 10% DISCOUNT ON ANY ADDITIONAL REGISTRANTS FOR THIS CLASS!**

REGISTRATION FORM (Course #CR6680-A1-CBA)

FAX: 303-629-1591 ◆ ONLINE: www.CFTWS.org ◆ MAIL: CFTWS, 1009 Grant Street, Suite 102, Denver, CO 80203

Name _____ Title _____ E-Mail _____

Name _____ Title _____ E-Mail _____

Name _____ Title _____ E-Mail _____

Company _____

Street Address _____

Phone _____ Fax _____

*Authorized Signature for Billing _____

Tuition Payment Option: *Bill Organization Check (payable to CFTWS) Visa/M/C

Card # _____ Exp. Date _____

Cardholder's Name _____ Signature _____

REGISTRATION GUIDELINE:

*REGISTER by **JUNE 3, 2010** to receive the "Early" Tuition Rate. NO REFUNDS WILL BE GIVEN AFTER JUNE 3rd, ALTHOUGH A SUBSTITUTE MAY ATEND. Cancellations received in writing prior to September 17th will be subject to a \$75 withdrawal fee. (Non-member \$500/\$525)