



2020 Calendar of Events

Register online at www.TheLeague.coop

(Tentative Schedule - Subject to Change)

Check out The League's robust training offerings. There's something for every role within the credit union. The best part is you'll be learning with other credit union professionals who understand the credit union movement and the unique opportunities and challenges that it brings.

See full event details, registration and information on our on demand webinars at TheLeague.coop.

The League is closely monitoring the ongoing novel Coronavirus (COVID-19) outbreak. As the situation continues to change rapidly, our top priority remains the health, safety, and well-being of our members and employees. At this time, all League in-person education and training events—including the 2020 Annual Convention & Expo—have been postponed indefinitely.

For those who have registered for any other in-person events, our Education & Training Department staff will be in contact with you. We appreciate your patience and understanding during this challenging time.

In-Person

Mar 25	Compliance Roundtable <i>(Postponed)</i>	Stevens Point, WI
Apr 7-8	ULEND Academy <i>(Postponed)</i>	Madison, WI
Apr 14	HR Roundtable <i>(Postponed)</i>	Stevens Point, WI
Apr 16	Small Credit Union CEO Roundtable <i>(Postponed)</i>	Green Bay, WI
Apr 24	FiCEP Registration Deadline	
May 6-9	League Annual Convention & Expo <i>(Postponed)</i>	Appleton, WI
May 27	Introduction to FiCEP & Logistics (Orientation)	Webinar
Jun 2	Exploring Why Workshops - <i>NEW</i>	Appleton, WI
Jun 4	Exploring Why Workshops - <i>NEW</i>	Merrill, WI
Jun 9	FiCEP Module 1	Webinar
Jun 11	YP Boot Camp	Wisconsin Dells, WI
Jun 12-13	Chapter Leaders Conference	Wisconsin Dells, WI
Jun 23	FiCEP Module 2	Webinar
Jul 7	FiCEP Module 3	Webinar
Jul 21	FiCEP Module 4	Webinar
Jul 26	Credit Union Day at the Ballpark	Milwaukee, WI
Jul 28	Exploring Why Workshops - <i>NEW</i>	Onalaska, WI
Jul 30	Exploring Why Workshops - <i>NEW</i>	Madison, WI
Aug 6	FiCEP - In Person Training & Testing Part I	Madison, WI
Aug 18	FiCEP Module 5	Webinar
Aug 26	Foundation Invitational	Wisconsin Dells, WI
Aug 27	Midsize Credit Union CEO Roundtable	Wisconsin Dells, WI
Sep 1	FiCEP Module 6	Webinar
Sep 15	FiCEP Module 7	Webinar
Sep 22	Compliance Roundtable (Fall)	Madison, WI
Sep 23	Small Credit Union CEO Roundtable	Madison, WI
Sep 29	FiCEP Module 8	Webinar
Oct 8	FiCEP - In Person Training & Testing Part II	Madison, WI
Oct 16-17	YP Conference	Eau Claire, WI
Oct 20	Business Lending Roundtable	TBD
Oct 23-24	Directors' Conference	TBD
Oct 29-30	Large Credit Union CEO Roundtable	Kohler, WI
Nov 10	HR Roundtable (Fall)	TBD
Dec 8	YP Boot Camp	Wausau

*** NEW in 2020 - Webinar Series *(see website for listing of topics/dates included in each series)*

Deposit Account Series | January 15
 Commercial Lending Series | February 12
 Growth & Transformation Series | May 28
 Cyber Series | August 12
 Risk Officer Series | August 20



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Board Governance

Apr 9	Board Secretary Training: Documenting Board Training, Minutes, Corrections & More	Webinar
May 6-9	League Annual Convention & Expo (Postponed)	Appleton, WI
Jun 2	Exploring Why Workshops - NEW	Appleton, WI
Jun 4	Exploring Why Workshops - NEW	Merrill, WI
Jul 23	Boards Behaving Badly: Handling Unruly Directors	Webinar
Jul 26	Credit Union Day at the Ballpark	Milwaukee, WI
Aug 26	Foundation Invitational	Wisconsin Dells, WI
Sep 17	Building the Best Possible Board Meeting: From Agenda to Action	Webinar
Oct 14	Regulatory Requirements for the Board: A Comprehensive Checklist	Webinar
Oct 23-24	Directors' Conference	TBD

Compliance

Mar 23	Get Ready for New ACH Return Code R11: Effective April 1, 2020	Webinar
Mar 25	Compliance Roundtable (Postponed)	Stevens Point, WI
Mar 25	Deposit Account Series: Advanced New Account Issues: POAs, Trusts, Estates & More	Webinar
Apr 7	Mastercard Dispute Resolution for Chargebacks	Webinar
Apr 8	Deposit Account Series: 10 Overdraft Hotspots, Including Regulations, Lawsuits & Guidance	Webinar
Apr 14	Establishing & Amending Traditional & Roth IRAs Including Secure Act Impact	Webinar
Apr 15	Advertising Compliance Part 1: Print, Radio & TV	Webinar
Apr 16	FCRA Compliance: From Delinquent Loans to New Hires	Webinar
Apr 21	Countdown to Reg CC Rule Changes Effective July 1, 2020	Webinar
Apr 28	Advertising Compliance Part 2: Website, Online & Social Media	Webinar
May 6-9	League Annual Convention & Expo (Postponed)	Appleton, WI
May 7	New Uniform Residential Loan Application Deadline Nov 1, 2020: Updating Policies & Testing Readiness	Webinar
May 11	Demystifying TRID for Construction Loans Using the New CFPB Guides	Webinar
May 12	Leveraging BSA Controls for More Effective OFAC Compliance	Webinar
Jun 2	Exploring Why Workshops - NEW	Appleton, WI
Jun 4	Exploring Why Workshops - NEW	Merrill, WI
Jun 4	UCC Article 9: Perfection Pitfalls & Proper Enforcement	Webinar
Jun 9	Three Key Risk Assessments in Enterprise Risk Management	Webinar
Jun 10	Debit & Prepaid Card Compliance: Disclosures, Fee Changes & More	Webinar
Jun 18	Handling ACH Exceptions & Returns	Webinar
Jun 24	Comparing Regulation E with Visa & Mastercard Rules	Webinar
Jul 7	Annual Training for the Branch: BSA, Identity Theft & Regs CC, D, E & DD	Webinar
Jul 26	Credit Union Day at the Ballpark	Milwaukee, WI
Aug 6	Advanced CTR Training: Beyond the "Textbook"	Webinar
Aug 26	Advanced IRA Beneficiary Issues: Death Distribution Calculations, Trusts, Successors & Secure Act Rules	Webinar
Aug 26	Foundation Invitational	Wisconsin Dells, WI
Sep 9	10 Lessons Learned When a Depositor Dies	Webinar
Sep 22	Compliance Roundtable (Fall)	Madison, WI



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Compliance

Sep 23	UCC-1 & UCC-3 Financing Statements Line-by-Line: Filing, Amending & Renewing	Webinar
Oct 20	Legally Handling ATM & Debit Card Claims Under Regulation E	Webinar
Oct 28	<i>Risk Officer Series: Advanced BSA Officer Training: Risk, Compliance & Real-Life Scenarios</i>	Webinar
Nov 17	10 Lessons Learned When a Borrower Dies	Webinar
Dec 2	Avoiding BSA Compliance Violations	Webinar
Dec 9	Recent Reg CC Changes: Lessons Learned & Future Outlook	Webinar

Executive Management

Mar 30	New Technology: Cash Recyclers, Pod Banking & Interactive ATMs	Webinar
Apr 16	Small Credit Union CEO Roundtable (Postponed)	Green Bay, WI
Apr 22	New FFIEC Procedures for Business Continuity Management & Resilience	Webinar
May 6-9	League Annual Convention & Expo (Postponed)	Appleton, WI
May 21	Call Report Advanced Lending Schedules	Webinar
Jun 2	Exploring Why Workshops - NEW	Appleton, WI
Jun 2	TDRs: Defining, Examples, Financial Reporting & Best Practices	Webinar
Jun 4	Exploring Why Workshops - NEW	Merrill, WI
Jul 22	Call Report Financial Statements B-E	Webinar
Jul 26	Credit Union Day at the Ballpark	Milwaukee, WI
Aug 26	Foundation Invitational	Wisconsin Dells, WI
Aug 27	Midsize Credit Union CEO Roundtable	Wisconsin Dells, WI
Sep 23	Small Credit Union CEO Roundtable	Madison, WI
Oct 7	Managing Vendors: Due Diligence, Contracts, Tips & Tools	Webinar
Oct 8	Compliance with E-SIGN, E-Statements & E-Disclosures	Webinar
Oct 20	Business Lending Roundtable	TBD
Oct 22	Banking & Lending to Cannabis Businesses: Clarifying the Confusion & Avoiding Pitfalls	Webinar
Oct 23-24	Directors' Conference	TBD
Oct 29-30	Large Credit Union CEO Roundtable	Kohler, WI

Fraud, Security & Technology

Mar 30	New Technology: Cash Recyclers, Pod Banking & Interactive ATMs	Webinar
May 6-9	League Annual Convention & Expo (Postponed)	Appleton, WI
Jun 2	Exploring Why Workshops - NEW	Appleton, WI
Jun 4	Exploring Why Workshops - NEW	Merrill, WI
Jul 8	Fraud by Channel Type: Check, Debit, Credit, ACH & Wire	Webinar
Jul 26	Credit Union Day at the Ballpark	Milwaukee, WI
Aug 12	<i>Cyber Series: Layered Cybersecurity: Finding the Best Strategy for Your Credit Union</i>	Webinar
Aug 20	<i>Risk Officer Series: The 15 Worst Security Mistakes</i>	Webinar
Aug 26	Foundation Invitational	Wisconsin Dells, WI
Sep 10	<i>Cyber Series: Cybersecurity Assessment Tool 2.0 & GLBA Privacy</i>	Webinar
Oct 6	<i>Risk Officer Series: A Year in the Life of a Compliance Officer: Tips, Tools & Annual</i>	Webinar
Oct 15	<i>Cyber Series: GLBA Security Expectations, Internal Controls & the Human Factor</i>	Webinar
Oct 29	<i>Cyber Series: Building & Sustaining a Cyber Intelligence Unit (CIU)</i>	Webinar



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Fraud, Security & Technology

Nov 12	Robbery: Critical Steps Before, During & After	Webinar
Nov 18	Risk Officer Series: Risk Management Officer: Expectations & Responsibilities	Webinar

HR

Apr 14	HR Roundtable (Postponed)	Stevens Point, WI
May 6-9	League Annual Convention & Expo (Postponed)	Appleton, WI
Jun 2	Exploring Why Workshops - NEW	Appleton, WI
Jun 4	Exploring Why Workshops - NEW	Merrill, WI
Jul 9	HR Compliance: Lessons Learned from Massive HR Failures	Webinar
Jul 26	Credit Union Day at the Ballpark	Milwaukee, WI
Aug 26	Foundation Invitational	Wisconsin Dells, WI
Aug 27	Effective & Compliant Pre-Employment Background Checks	Webinar
Nov 4	Recruiting & Retaining Millennials, Gen Z & Nexters	Webinar
Nov 10	HR Roundtable (Fall)	TBD
Nov 18	Risk Officer Series: Risk Management Officer: Expectations & Responsibilities	Webinar

Leadership

Apr 14	HR Roundtable (Postponed)	Stevens Point, WI
May 6-9	League Annual Convention & Expo (Postponed)	Appleton, WI
May 27	Branch Manager Guide to Success	Webinar
Jun 2	Exploring Why Workshops - NEW	Appleton, WI
Jun 4	Exploring Why Workshops - NEW	Merrill, WI
Jun 12-13	Chapter Leaders Conference	Wisconsin Dells, WI
Jul 22	Call Report Financial Statements B-E	Webinar
Jul 26	Credit Union Day at the Ballpark	Milwaukee, WI
Aug 26	Foundation Invitational	Wisconsin Dells, WI
Nov 10	HR Roundtable (Fall)	TBD

Lending

Mar 24	Collecting SBA Loans: Critical Steps in Protecting the SBA Guaranty	Webinar
Mar 26	<i>Commercial Lending Series: Commercial Flood Insurance Rules & Best Practices</i>	Webinar
Apr 2	<i>Commercial Lending Series: Commercial Loan Workouts, Restructuring & Loss Mitigation</i>	Webinar
Apr 7-8	ULEND Academy (Postponed)	Madison, WI
Apr 16	FCRA Compliance: From Delinquent Loans to New Hires	Webinar
Apr 29	<i>Commercial Lending Series: Commercial Loans Secured by Real Estate</i>	Webinar
Apr 30	Consumer Bankruptcy: Compliance, Cramdowns & More	Webinar
May 5	E-SIGN for Lenders: Technicalities, Consumer Expectations & Risk	Webinar
May 6-9	League Annual Convention & Expo (Postponed)	Appleton, WI
May 6	Writing Compelling Credit Memos & Loan Narratives with Confidence	Webinar
May 7	New Uniform Residential Loan Application Deadline Nov 1, 2020: Updating Policies & Testing Readiness	Webinar
May 11	Demystifying TRID for Construction Loans Using the New CFPB Guides	Webinar
May 13	<i>Commercial Lending Series: Analyzing Commercial Tax Returns: Forms 1065, 1120, 1120S & K-1s</i>	Webinar
May 20	Credit Reporting & Delinquent Accounts: Disputes, Revisions & Guidance	Webinar



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Lending

May 21	Call Report Advanced Lending Schedules	Webinar
Jun 2	Exploring Why Workshops - NEW	Appleton, WI
Jun 3	Consumer Loan Underwriting Fundamentals: Interviews, Credit Reports, Compliance & Debt Ratios	Webinar
Jun 4	Exploring Why Workshops - NEW	Merrill, WI
Jun 11	Completing the TRID Loan Estimate Line-by-Line	Webinar
Jun 16	Fair Lending Comparative File Review That Meets Regulator Expectations	Webinar
Jun 23	20 Common Mistakes in Consumer Collections	Webinar
Jun 25	Managing In-House Real Estate Evaluations	Webinar
Jul 1	Top 10 Consumer Loan Documentation Mistakes	Webinar
Jul 14	Completing the TRID Closing Disclosure Line-by-Line	Webinar
Jul 16	HMDA: Still a Four-Letter Word?	Webinar
Jul 26	Credit Union Day at the Ballpark	Milwaukee, WI
Jul 29	Beneficial Ownership Rules for Business Accounts & Loans	Webinar
Jul 30	Lending to Self-Employed Borrowers	Webinar
Aug 4	Maximizing Recoveries on Charged-Off Loans	Webinar
Aug 18	Collections & Right of Set Off in Commercial Lending	Webinar
Aug 26	Foundation Invitational	Wisconsin Dells, WI
Sep 2	Cutting-Edge Consumer Payments: Beyond PayPal & Venmo	Webinar
Sep 3	SAFE Act Compliance for Mortgage Loan Originators (MLOs)	Webinar
Sep 22	Avoiding Costly Mistakes in Calculating Debt Service Coverage	Webinar
Sep 29	Mastering Escrow: Analysis, Rules, Forms & Compliance	Webinar
Oct 20	Business Lending Roundtable	TBD
Oct 21	Regulator Update for the Credit Analyst	Webinar
Oct 22	Banking & Lending to Cannabis Businesses: Clarifying the Confusion & Avoiding Pitfalls	Webinar
Nov 3	Dissecting Loan Loss Reserves, Including CECL Expectations	Webinar
Dec 3	Annual Loan Review: Consumer, Commercial & Residential	Webinar
Dec 10	Legal Issues Surrounding Subpoenas & Summonses	Webinar
Dec 16	Avoiding Loan Denial Mistakes	Webinar

Marketing

Apr 15	Advertising Compliance Part 1: Print, Radio & TV	Webinar
Apr 28	Advertising Compliance Part 2: Website, Online & Social Media	Webinar
May 28	Growth & Transformation Series: Driving Engagement with Facebook, Twitter & Instagram	Webinar
Jun 30	<i>Growth & Transformation Series</i> : Digital Marketing Strategies: What's Working in 2020?	Webinar
Jul 15	<i>Growth & Transformation Series</i> : Attracting Millennials: The Next Generation of Revenue	Webinar
Aug 11	<i>Growth & Transformation Series</i> : Leveraging LinkedIn for Lenders	Webinar
Oct 8	Compliance with E-SIGN, E-Statements & E-Disclosures	Webinar

Member Service

Mar 23	Get Ready for New ACH Return Code R11: Effective April 1, 2020	Webinar
Mar 25	<i>Deposit Account Series</i> : Advanced New Account Issues: POAs, Trusts, Estates & More	Webinar
Apr 7-8	ULEND Academy (Postponed)	Madison, WI
Apr 8	<i>Deposit Account Series</i> : 10 Overdraft Hotspots, Including Regulations, Lawsuits & Guidance	Webinar
May 6-9	League Annual Convention & Expo (Postponed)	Appleton, WI
May 12	Leveraging BSA Controls for More Effective OFAC Compliance	Webinar



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Member Service

Jun 2	Exploring Why Workshops - NEW	Appleton, WI
Jun 4	Exploring Why Workshops - NEW	Merrill, WI
Jul 7	Annual Training for the Branch: BSA, Identity Theft & Regs CC, D, E & DD	Webinar
Jul 26	Credit Union Day at the Ballpark	Milwaukee, WI
Aug 6	Advanced CTR Training: Beyond the "Textbook"	Webinar
Aug 25	Liability with ACH Death Notification Entries (DNEs) & Reclamations	Webinar
Aug 26	Foundation Invitational	Wisconsin Dells, WI
Nov 10	IRS Reporting Essentials: Form 1099 & Beyond	Webinar
Dec 2	Avoiding BSA Compliance Violations	Webinar
Dec 9	Recent Reg CC Changes: Lessons Learned & Future Outlook	Webinar

Operations

Mar 30	New Technology: Cash Recyclers, Pod Banking & Interactive ATMs	Webinar
Apr 7	Mastercard Dispute Resolution for Chargebacks	Webinar
Apr 14	Establishing & Amending Traditional & Roth IRAs, Including Secure Act Impact	Webinar
Apr 22	New FFIEC Procedures for Business Continuity Management & Resilience	Webinar
May 6-9	League Annual Convention & Expo (Postponed)	Appleton, WI
May 14	Visa Claims Resolution for Chargebacks	Webinar
May 19	Updating Your CDD Program: Beneficial Ownership, Triggering Events & New SSN Verification	Webinar
Jun 2	Exploring Why Workshops - NEW	Appleton, WI
Jun 4	Exploring Why Workshops - NEW	Merrill, WI
Jun 4	UCC Article 9: Perfection Pitfalls & Proper Enforcement	Webinar
Jun 10	Debit & Prepaid Card Compliance: Disclosures, Fee Changes & More	Webinar
Jun 18	Handling ACH Exceptions & Returns	Webinar
Jun 24	Comparing Regulation E with Visa & Mastercard Rules	Webinar
Jul 21	Responding to Garnishment & Levy Demands	Webinar
Jul 26	Credit Union Day at the Ballpark	Milwaukee, WI
Jul 28	Handling Consumer Complaints & Disputes	Webinar
Aug 4	Fundamentals of IRA Beneficiary Designations & Distributions, Including Secure Act Impact	Webinar
Aug 25	Liability with ACH Death Notification Entries (DNEs) & Reclamations	Webinar
Aug 26	Advanced IRA Beneficiary Issues: Death Distribution Calculations, Trusts, Successors & Secure Act Rules	Webinar
Aug 26	Foundation Invitational	Wisconsin Dells, WI
Sep 9	10 Lessons Learned When a Depositor Dies	Webinar
Sep 30	FFIEC Requirements for a Remote Deposit Capture Risk Assessment	Webinar
Oct 6	<i>Risk Officer Series: A Year in the Life of a Compliance Officer: Tips, Tools & Annual</i>	Webinar
Oct 7	Managing Vendors: Due Diligence, Contracts, Tips & Tools	Webinar
Oct 20	Legally Handling ATM & Debit Card Claims Under Regulation E	Webinar
Nov 10	IRS Reporting Essentials: Form 1099 & Beyond	Webinar
Nov 11	Year-End Actions for IRA Administrators: Notifications, Reporting, Monitoring & Secure Act Changes	Webinar



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Operations

Nov 17	10 Lessons Learned When a Borrower Dies	Webinar
Nov 18	Risk Officer Series: Risk Management Officer: Expectations & Responsibilities	Webinar
Dec 1	Using Notary & Corporate Seals Accurately	Webinar

Young Professionals

Jun 2	Exploring Why Workshops - NEW	Appleton, WI
Jun 4	Exploring Why Workshops - NEW	Merrill, WI
Jun 11	YP Boot Camp	Wisconsin Dells, WI
Jul 26	Credit Union Day at the Ballpark	Milwaukee, WI
Aug 26	Foundation Invitational	Wisconsin Dells, WI
Oct 16-17	YP Conference	Eau Claire, WI
Dec 8	YP Boot Camp	Wausau, WI