



2019 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.

In-Person

Mar 10-14	CUNA GAC	Washington, DC
Mar 13	Compliance Roundtable	Appleton, WI
Mar 19	Women's Leadership	Wausau, WI
Mar 21	Small Credit Union CEO Roundtable	Appleton, WI
Mar 27	HR Roundtable 2019	Stevens Point, WI
Mar 28	Town Hall Meeting	Appleton, WI
Apr 9	Cybersecurity Summit	Madison, WI
Apr 10	Fraud Seminar	Madison, WI
Apr 17-18	Collections Roundtable	Madison, WI
Apr 20-27	Money Smart Week	
May 8-11	League Annual Convention	Lake Geneva, WI
Jun 14-15	Chapter Leaders Conference	Wisconsin Dells, WI
Jul 14	Credit Union Day at the Ballpark	Milwaukee, WI
Aug 20	YP Boot Camp	Stevens Point, WI
Aug 21	Community Development	Stevens Point, WI
Aug 22	Youth Financial Education	Stevens Point, WI
Aug 28	League Invitational	Wisconsin Dells, WI
Aug 29	Midsized Credit Union CEO Roundtable	Wisconsin Dells, WI
Sep 17-18	Hike the Hill	Washington, D.C.
Oct 8-9	ULEND Academy	Appleton, WI
Oct 18-19	YP Conference	Wisconsin Dells, WI
Oct 20	Town Hall Meeting	Madison, WI
Oct 25-26	Directors' Conference	Sheboygan, WI
Nov 7	Large Credit Union CEO Roundtable	Kohler, WI
Nov 12	HR Roundtable FALL	Wisconsin Dells, WI



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Board Member

Check out the new [Board Reporting Series](#) *

Mar 10-14	CUNA GAC	Washington, DC
Mar 19	Best Practices for Today's Credit Union Board	Webinar
Mar 19	Women's Leadership	Wausau
Mar 26 *	Red Flags in Board Reports	Webinar
Mar 28	Town Hall Meeting	Appleton, WI
Apr 9 *	Security Officer Reports to the Board: Fulfilling Your Annual Requirement	Webinar
May 8-11	League Annual Convention	Lake Geneva, WI
May 23	Supervisory Committees: Understanding Expectations & Avoiding Landmines	Webinar
Jun 10	Financial Literacy Fundamentals for New Directors: Financial Statements, Key Ratios & How to Monitor Your Credit Union	Webinar
Jun 25	Job-Specific BSA Training for the Board	Webinar
Jul 14	Credit Union Day at the Ballpark	Milwaukee, WI
Aug 13	Advanced Financial Literacy Update for New & Experienced Directors: ALM Primer & Financial Accounting & Risk Issues	Webinar
Aug 22	Developing the Right Strategic Plan for Your Credit Union	Webinar
Aug 28	League Invitational	Wisconsin Dells, WI
Sep 17-18	Hike the Hill	Washington, D.C.
Sep 26	What Directors Should Know About CECL, ALLL & the New Credit Impairment Standards	Webinar
Oct 18-19	YP Conference	Wisconsin Dells, WI
Oct 20	Town Hall Meeting	Madison, WI
Oct 25-26	Directors' Conference	Sheboygan, WI

Compliance & Regulatory

Mar 10-14	CUNA GAC	Washington, DC
Mar 11	Cross Selling: The Key to Accountholder Satisfaction & Retention	Webinar
Mar 13	Compliance Roundtable	Appleton, WI
Mar 13	2019 ACH Rules Update	Webinar
Mar 14	Debit Card Chargebacks Part 2: Understanding Mastercard Rule Changes	Webinar
Mar 19	Women's Leadership	Wausau
Mar 20	Advanced BSA Officer Training: In-Depth Risk Issues & Difficult Situations	Webinar
Apr 3	UDAAP: Consumer Complaint Monitoring & Avoiding Harm	Webinar
Apr 8	Notary Essentials & Legalities	Webinar
Apr 18	Liability with ACH Death Notification Entries (DNEs) & Reclamations	Webinar
May 8-11	League Annual Convention	Lake Geneva, WI
May 13	Accurately Completing the SAR Line-by-Line	Webinar
May 16	Hot Issues in Cyber Compliance	Webinar
May 20	Top 10 Ways to Mitigate ACH Payment Risk	Webinar
May 29	ACH Stop Payments vs. Unauthorized Extended Returns: Know the Difference	Webinar
Jun 5	Job-Specific BSA Training for Operations	Webinar



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Compliance & Regulatory

Jun 6	Handling Dormant Accounts, Unclaimed Property & Escheatment	Webinar
Jun 12	Handling IRA Required Minimum Distributions & Roth Distributions	Webinar
Jun 18	Reg E Fundamentals	Webinar
Jul 2	Managing Accounts & Records for Nonresident Aliens: Opening, Identifying, Monitoring & Tax Reporting	Webinar
Jul 14	Credit Union Day at the Ballpark	Milwaukee, WI
Jul 16	Processing IRA Rollovers & Transfers	Webinar
Jul 18	Legally Handling ATM & Debit Card Claims Under Regulation E	Webinar
Aug 1	IRA Reporting, Common Issues & Error Resolution	Webinar
Aug 7	Official Demands Part 1: Handling Subpoenas, Summonses & Other Legal Process	Webinar
Aug 20	How to Handle Unauthorized Electronic Fund Transfers Under Reg E	Webinar
Aug 28	League Invitational	Wisconsin Dells, WI
Aug 28	Top 10 Most Misunderstood IRA Issues: Turning Confusion into Confidence	Webinar
Sep 5	Auditing E-Policies & Procedures: Risks, Rules & Records	Webinar
Sep 10	Managing Minor Accounts: Withdrawals, Transfers, CDD, Closing & Best Practices	Webinar
Sep 11	Conducting the 2019 ACH Audit	Webinar
Sep 16	New Compliance Officer Boot Camp	Webinar
Sep 17-18	Hike the Hill	Washington, D.C.
Sep 18	Auditing for Reg E Compliance	Webinar
Oct 2	New BSA Officer Training Part 1: Compliance, Risk Assessment, CTRs, Exemptions, Forms & Regulator Expectations	Webinar
Oct 9	When a Depositor Dies: Legal Requirements, Practical Issues & FAQs	Webinar
Oct 16	Reg E Requirements for Debit Card Error Resolution: Processing, Disclosure & Investigation	Webinar
Oct 18-19	YP Conference	Wisconsin Dells, WI
Oct 29	Personal Accounts: Ownership, Authorization, Titling & Documentation	Webinar
Oct 31	New BSA Officer Training Part 2: Reviews, SARs, CDD, Technical Aspects & Real-Life Scenarios	Webinar
Nov 5	Year-End Compliance Checklist	Webinar
Nov 7	Understanding & Navigating ACH Rules for ODFIs	Webinar
Nov 19	When a Borrower Dies: Rules, Procedures & Liabilities	Webinar
Nov 20	Robbery Preparedness: Meeting Your Annual Compliance Requirement	Webinar
Nov 21	BSA Special Risks: Policy, Law Enforcement & Regulator Issues	Webinar
Dec 3	ACH Error Resolution: Returns, Authorizations, WSUDs, Stop Payments & More	Webinar
Dec 4	Safe Deposit Issues: Delinquency, Death & Abandonment	Webinar
Dec 5	IRS Reporting Requirements: 1098s, 1099s, TINs & Backup Withholding	Webinar
Dec 18	Securing Collateral: How to Complete & File UCC-1 Financing Statements	Webinar



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Executive

Mar 10-14	CUNA GAC	Washington, DC
Mar 19	Women's Leadership	Wausau
Mar 21	Small Credit Union CEO Roundtable	Appleton
Mar 28	Town Hall Meeting	Appleton, WI
Apr 4	Enterprise Risk Management: Three Key Risk Assessments	Webinar
Apr 25	Asset Liability Management Strategies in a Rising Rate Environment	Webinar
Apr 30	Introduction to Call Report Loan Classifications	Webinar
May 8-11	League Annual Convention	Lake Geneva, WI
May 23	Supervisory Committees: Understanding Expectations & Avoiding Landmines	Webinar
Jun 13	Financial Accounting & Reporting	Webinar
Jul 14	Credit Union Day at the Ballpark	Milwaukee, WI
Jul 23	Call Report Preparation: Avoiding Common Errors	Webinar
Jul 24	Outsourcing Tech Services: Regulations, Examiner Expectations & Actions for Vendor Management	Webinar
Aug 7	Official Demands Part 1: Handling Subpoenas, Summonses & Other Legal Process	Webinar
Aug 21	The Financial Statement Audit Process	Webinar
Aug 22	Developing the Right Strategic Plan for Your Credit Union	Webinar
Aug 28	League Invitational	Wisconsin Dells, WI
Aug 29	Midsize Credit Union CEO Roundtable	Wisconsin Dells, WI
Sep 17-18	Hike the Hill	Washington, D.C.
Oct 18-19	YP Conference	Wisconsin Dells, WI
Oct 20	Town Hall Meeting	Madison, WI
Oct 25-26	Directors' Conference	Sheboygan, WI
Nov 7	Large Credit Union CEO Roundtable	Kohler, WI
Nov 12	HR Roundtable FALL	Wisconsin Dells, WI

Finance & Accounting

Mar 10-14	CUNA GAC	Washington, DC
Mar 13	2019 ACH Rules Update	Webinar
Mar 19	Women's Leadership	Wausau
Apr 18	Liability with ACH Death Notification Entries (DNEs) & Reclamations	Webinar
Apr 24	Escrow Account Shortages, Surpluses & Deficiencies	Webinar
Apr 30	Introduction to Call Report Loan Classifications	Webinar
May 8-11	League Annual Convention	Lake Geneva, WI
May 29	ACH Stop Payments vs. Unauthorized Extended Returns: Know the Difference	Webinar
Jun 3	Untangling Complex RDFI Challenges	Webinar
Jun 13	Financial Accounting & Reporting	Webinar
Jul 1	ALLL Supporting Documentation: Current Rules & Future Expectations Under CECL	Webinar
Jul 14	Credit Union Day at the Ballpark	Milwaukee, WI
Jul 16	Processing IRA Rollovers & Transfers	Webinar
Jul 23	Call Report Preparation: Avoiding Common Errors	Webinar
Aug 1	IRA Reporting, Common Issues & Error Resolution	Webinar



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Finance & Accounting

Aug 20	How to Handle Unauthorized Electronic Fund Transfers Under Reg E	Webinar
Aug 21	The Financial Statement Audit Process	Webinar
Aug 28	League Invitational	Wisconsin Dells, WI
Aug 28	Top 10 Most Misunderstood IRA Issues: Turning Confusion into Confidence	Webinar
Sep 4	Official Demands Part 2: Handling Garnishments, Levies & Judgment Liens	Webinar
Sep 11	Conducting the 2019 ACH Audit	Webinar
Sep 17-18	Hike the Hill	Washington, D.C.
Oct 16	Reg E Requirements for Debit Card Error Resolution: Processing, Disclosure & Investigation	Webinar
Oct 18-19	YP Conference	Wisconsin Dells, WI
Nov 7	Understanding & Navigating ACH Rules for ODFIs	Webinar
Dec 3	ACH Error Resolution: Returns, Authorizations, WSUDs, Stop Payments & More	Webinar
Dec 5	IRS Reporting Requirements: 1098s, 1099s, TINs & Backup Withholding	Webinar
Dec 18	Securing Collateral: How to Complete & File UCC-1 Financing Statements	Webinar

HR & Training

Mar 10-14	CUNA GAC	Washington, DC
Mar 19	Women's Leadership	Wausau
Mar 27	HR Roundtable 2019	Stevens Point, WI
Apr 9	Security Summit	Madison, WI
Apr 29	Hacking the Weakest Link: The Role of Staff in Maintaining IT Security	Webinar
May 8-11	League Annual Convention	Lake Geneva, WI
Jun 11	Essential HR Recordkeeping from Hiring to Firing	Webinar
Jun 19	HR Webinar	Webinar
Jul 14	Credit Union Day at the Ballpark	Milwaukee, WI
Aug 28	League Invitational	Wisconsin Dells, WI
Sep 17-18	Hike the Hill	Washington, D.C.
Sep 18	HR Webinar	Webinar
Sep 25	Hiring in the Digital Age: What Every HR Manager Needs to Know About Social Media	Webinar
Oct 18-19	YP Conference	Wisconsin Dells, WI
Nov 12	HR Roundtable FALL	Wisconsin Dells, WI

IT & Security

Mar 10-14	CUNA GAC	Washington, DC
Mar 12	Synthetic ID Fraud: What It Is, How It Works & Real-Life Scenarios	Webinar
Mar 19	Women's Leadership	Wausau
Mar 20	Advanced BSA Officer Training: In-Depth Risk Issues & Difficult Situations	Webinar
Apr 2	Mobile Device Risks, Records & Compliance Rules: Managing Your BYOD & COPE Policies & Procedures	Webinar
Apr 9	Cybersecurity Summit	Madison, WI
Apr 10	Fraud Seminar	Madison, WI
Apr 29	Hacking the Weakest Link: The Role of Staff in Maintaining IT Security	Webinar
May 8-11	League Annual Convention	Lake Geneva, WI



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IT & Security

May 16	Hot Issues in Cyber Compliance	Webinar
Jun 19	Electronic Returned Items: Combating Fraud	Webinar
Jun 26	Card Data Security: PCI-DSS Risk, Readiness & Compliance	Webinar
Jul 10	FinCEN Guidelines on Reporting Elder Financial Exploitation	Webinar
Jul 14	Credit Union Day at the Ballpark	Milwaukee, WI
Jul 24	Outsourcing Tech Services: Regulations, Examiner Expectations & Actions for Vendor Management	Webinar
Jul 30	Opening Accounts Online: Rules, Risks & Best Practices	Webinar
Aug 8	New Security Officer Training: Responsibilities, Best Practices & Skill-Building Tools	Webinar
Aug 14	FFIEC Cyber Security Risk Assessments: Policy, Recent Findings & Recommendations	Webinar
Aug 28	League Invitational	Wisconsin Dells, WI
Sep 17-18	Hike the Hill	Washington, D.C.
Sep 24	Mitigating a Data Breach: Forensics & Incident Response	Webinar
Oct 18-19	YP Conference	Wisconsin Dells, WI
Nov 20	Robbery Preparedness: Meeting Your Annual Compliance Requirement	Webinar

Leadership

Mar 10-14	CUNA GAC	Washington, DC
Mar 19	Women's Leadership	Wausau
May 8-11	League Annual Convention	Lake Geneva, WI
Jul 14	Credit Union Day at the Ballpark	Milwaukee, WI
Aug 28	League Invitational	Wisconsin Dells, WI
Sep 17-18	Hike the Hill	Washington, D.C.
Oct 8	Head Teller Training: Maximizing Teller Performance	Webinar
Oct 18-19	YP Conference	Wisconsin Dells, WI
Nov 5	Year-End Compliance Checklist	Webinar
Nov 12	HR Roundtable FALL	Wisconsin Dells, WI

Lending & Collections

Mar 10-14	CUNA GAC	Washington, DC
Mar 19	Women's Leadership	Wausau
Mar 21	Required Compliance for Commercial Loans Secured by Real Estate	Webinar
Mar 25	Handling Power of Attorney & Living Trust Documents on Deposit Accounts & Loans	Webinar
Mar 27	Global Cash Flow Analysis for Underwriters & Credit Analysts	Webinar
Apr 16	Loan Underwriting 101: Interviewing, Credit Reports, Debt Ratios & Regulation B	Webinar
Apr 17-18	Collections Roundtable	Madison, WI
Apr 17	Your Borrower Filed Bankruptcy, Now What?	Webinar
Apr 23	Top 20 Questions About Completing the TRID Loan Estimate & Closing Disclosure	Webinar
Apr 24	Escrow Account Shortages, Surpluses & Deficiencies	Webinar
May 2	Troubled Debt Restructuring: Identifying & Accounting for Impaired Loans	Webinar
May 7	Developing & Delivering an Effective Loan Presentation	Webinar
May 8-11	League Annual Convention	Lake Geneva, WI
May 9	Job-Specific BSA Training for Lenders	Webinar



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Lending & Collections

May 21	Evaluating Collateral & Personal Guarantees for Loan Repayment	Webinar
May 22	Repossession Practices, Compliance & Limitations	Webinar
May 30	Military Lending Act & SCRA: Compliance & Lessons Learned	Webinar
Jun 4	Construction-Only & Construction-to-Permanent Lending	Webinar
Jun 20	Effective Debt Collection Techniques & Strategies	Webinar
Jun 27	Living, Grantor & Family Trust Accounts: Common Problems in Account Opening & Lending	Webinar
Jul 9	Surviving a TRID Compliance Exam	Webinar
Jul 14	Credit Union Day at the Ballpark	Milwaukee, WI
Jul 25	What Are Those Business Tax Returns Telling Me?	Webinar
Aug 28	League Invitational	Wisconsin Dells, WI
Aug 29	Effective Management of Credit Report Disputes: Completing ACDVs, AUDs & Correcting Joint Credit	Webinar
Sep 12	Appraisal & Evaluation Guidance on Collateral Valuation	Webinar
Sep 17-18	Hike the Hill	Washington, D.C.
Oct 8-9	ULEND Academy	Appleton, WI
Oct 15	Demystifying Rules for TRID Tolerances	Webinar
Oct 18-19	YP Conference	Wisconsin Dells, WI
Oct 22	Commercial Loan Annual Credit Review	Webinar
Oct 30	1099 Reporting: Foreclosures, Repossessions & Debt Settlements	Webinar
Nov 14	Uniform Residential Loan Application (URLA) Line-by-Line, Required February 1, 2020	Webinar
Nov 19	When a Borrower Dies: Rules, Procedures & Liabilities	Webinar
Dec 11	Business Accounts: Who is Authorized to Open, Close, Transact?	Webinar

Marketing & Business Dev.

Mar 10-14	CUNA GAC	Washington, DC
Mar 19	Women's Leadership	Wausau
May 8-11	League Annual Convention	Lake Geneva, WI
Jul 14	Credit Union Day at the Ballpark	Milwaukee, WI
Jul 30	Opening Accounts Online: Rules, Risks & Best Practices	Webinar
Aug 15	E-Compliance Rules, Policies & Best Practices for Email, Web, Mobile & Social Media	Webinar
Aug 28	League Invitational	Wisconsin Dells, WI
Sep 17-18	Hike the Hill	Washington, D.C.
Sep 19	Emerging Trends & Developments in Online, Mobile & Digital Channels	Webinar
Oct 18-19	YP Conference	Wisconsin Dells, WI
Oct 25	12 Key Elements of an Effective Digital Marketing Strategy	Webinar
Nov 6	Top 10 Compliance Mistakes in Advertising	Webinar



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Member Service

Check out the new **Teller Training Series** *

Mar 10-14	CUNA GAC	Washington, DC
Mar 11 *	Cross Selling: The Key to Accountholder Satisfaction & Retention	Webinar
Mar 19	Women's Leadership	Wausau
Mar 25	Handling Power of Attorney & Living Trust Documents on Deposit Accounts & Loans	Webinar
Apr 10 *	Accurately Completing the CTR Line-by-Line	Webinar
May 8-11	League Annual Convention	Lake Geneva, WI
May 13	Accurately Completing the SAR Line-by-Line	Webinar
May 15 *	Managing Dual Control & Cash Limits	Webinar
Jun 6	Handling Dormant Accounts, Unclaimed Property & Escheatment	Webinar
Jun 27	Living, Grantor & Family Trust Accounts: Common Problems in Account Opening & Lending	Webinar
Jul 14	Credit Union Day at the Ballpark	Milwaukee, WI
Jul 17	Job-Specific BSA Training for the Frontline	Webinar
Aug 20	YP Boot Camp	Stevens Point, WI
Aug 21	Community Development	Stevens Point, WI
Aug 22	Youth Financial Education	Stevens Point, WI
Aug 27	Opening Donation, Memorial & Other Accounts for Nonprofit Organizations & Corporations	Webinar
Aug 28	League Invitational	Wisconsin Dells, WI
Sep 10	Managing Minor Accounts: Withdrawals, Transfers, CDD, Closing & Best Practices	Webinar
Sep 17-18	Hike the Hill	Washington, D.C.
Oct 17	POD Account Documentation, Compliance, Beneficiaries & Closing	Webinar
Oct 23	Medallion & Signature Guarantee Risks, Rules & Best Practices	Webinar
Oct 29	Personal Accounts: Ownership, Authorization, Titling & Documentation	Webinar
Dec 4	Safe Deposit Issues: Delinquency, Death & Abandonment	Webinar