



2018 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

Dec 6	YP Boot Camp: Antigo	Antigo, WI
Dec 11	Innovation Workshop	Appleton, WI
Dec 13	Holiday Open House	Madison, WI
Dec 19	Town Hall Meeting	Merrill, WI

2019

Jan 23	WCULAF - Team Trivia Night Fundraiser	Madison, WI
Jan 24-25	2019 State Governmental Affairs Conference	Madison, WI
Mar 5-6	ULEND Academy	Wisconsin Dells, WI
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 SPRING	Stevens Point, WI
Apr 20-27	Money Smart Week	
May 8-11	League Annual Convention	Lake Geneva, WI
Nov 12	HR Roundtable FALL	Wisconsin Dells, WI



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(Tentative Schedule - Subject to Change)

Board Member

Dec 6	YP Boot Camp: Antigo	Antigo, WI
Dec 11	Auditing Call Reports	Webinar
Dec 11	Innovation Workshop	Appleton, WI
Dec 19	BSA Officer Reports to the Board	Webinar

Compliance & Regulatory

Dec 4	Compliance Questions & Issues in Deploying Mobile Remote Deposit Capture	Webinar
Dec 5	Auditing for HMDA Compliance, Including New Data Collection Rules	Webinar
Dec 6	Improving Teller Performance: Head Teller Development	Webinar
Dec 6	YP Boot Camp: Antigo	Antigo, WI
Dec 10	Filing the New SAR Form, Deadline January 1, 2019	Webinar
Dec 11	Auditing Call Reports	Webinar
Dec 11	Innovation Workshop	Appleton, WI
Dec 13	Your Depositor Has Died: Actions to Take, Mistakes to Avoid	Webinar
Dec 18	Closing or Changing Accounts for Consumers & Businesses	Webinar
Dec 20	Handling Government ACH Payment Returns & Reclamations	Webinar

Executive

Dec 6	YP Boot Camp: Antigo	Antigo, WI
Dec 11	Innovation Workshop	Appleton, WI
Dec 12	Dealing with Joint Signers in Consumer & Real Estate Lending	Webinar
Dec 19	BSA Officer Reports to the Board	Webinar

Finance & Accounting

Dec 6	YP Boot Camp: Antigo	Antigo, WI
Dec 11	Auditing Call Reports	Webinar
Dec 11	Innovation Workshop	Appleton, WI

HR & Training

Dec 6	Improving Teller Performance: Head Teller Development	Webinar
Dec 6	YP Boot Camp: Antigo	Antigo, WI
Dec 11	Innovation Workshop	Appleton, WI

IT & Security

Dec 6	YP Boot Camp: Antigo	Antigo, WI
Dec 11	Innovation Workshop	Appleton, WI

Leadership

Dec 6	Improving Teller Performance: Head Teller Development	Webinar
Dec 6	YP Boot Camp: Antigo	Antigo, WI
Dec 10	Filing the New SAR Form, Deadline January 1, 2019	Webinar
Dec 11	Innovation Workshop	Appleton, WI

Lending & Collections

Dec 5	Auditing for HMDA Compliance, Including New Data Collection Rules	Webinar
Dec 6	YP Boot Camp: Antigo	Antigo, WI
Dec 11	Innovation Workshop	Appleton, WI
Dec 12	Dealing with Joint Signers in Consumer & Real Estate Lending	Webinar



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Marketing & Business Dev.

Dec 6	YP Boot Camp: Antigo	Antigo, WI
Dec 11	Innovation Workshop	Appleton, WI

Member Service

Oct 31	Job-Specific Compliance Training for Deposit Operations	Webinar
Nov 14	Robbery Preparedness: Requirements & Proven Strategies	Webinar
Dec 4	Compliance Questions & Issues in Deploying Mobile Remote Deposit Capture	Webinar
Dec 6	Improving Teller Performance: Head Teller Development	Webinar
Dec 6	YP Boot Camp: Antigo	Antigo, WI
Dec 11	Innovation Workshop	Appleton, WI
Dec 13	Your Depositor Has Died: Actions to Take, Mistakes to Avoid	Webinar
Dec 18	Closing or Changing Accounts for Consumers & Businesses	Webinar
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Jan 24-25	2019 State Governmental Affairs Conference	Madison, WI
Mar 5-6	ULEND Academy	Wisconsin Dells, WI
Mar 10-14	CUNA GAC	Washington, DC
Mar 13	Compliance Roundtable	Appleton, WI
Mar 19	Women's Leadership	Wausau
Mar 21	Small Credit Union CEO Roundtable	Appleton
Apr 20-27	Money Smart Week	
May 8-11	League Annual Convention	Lake Geneva, WI

Board Member

Jan 23	WCULAF - Team Trivia Night Fundraiser	Madison
Jan 24-25	2019 State Governmental Affairs Conference	Madison, WI
Feb 13	Board Secretary Procedural & Compliance Responsibilities	Webinar
Mar 6	Essential Board Reporting: Requirements, Timing, Delivery Options, Risks & Concerns	Webinar
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 21	Small Credit Union CEO Roundtable	Appleton
Mar 26	Red Flags in Board Reports	Webinar
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
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
Sep 26	What Directors Should Know About CECL, ALLL & the New Credit Impairment Standards	Webinar

Compliance & Regulatory

Jan 8	Compliance Training for the Frontline	Webinar
Jan 9	Record Retention & Destruction Rules: Paper & Electronic	Webinar
Jan 14	IRA & HSA 2019 Update, Including Tax Reform Considerations	Webinar
Jan 15	FFIEC Exam Procedures for Business Continuity	Webinar
Jan 23	WCULAF - Team Trivia Night Fundraiser	Madison
Jan 24-25	2019 State Governmental Affairs Conference	Madison, WI
Jan 31	Frontline Fraud Prevention: Stopping Fraud at the Teller Line	Webinar



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Compliance & Regulatory

Feb 5	Right of Setoff on Deposit Accounts & Loans: Legal Issues	Webinar
Feb 7	ACH Tax Refund Exceptions, Posting & Liabilities	Webinar
Feb 14	Prepaid Cards: Your Credit Union's Responsibilities Under the New Rules, Effective April 1, 2019	Webinar
Feb 25	Debit Card Chargebacks Part 1: Understanding Visa Rule Changes	Webinar
Feb 27	ACH Dispute Resolution	Webinar
Feb 28	Flood Insurance Compliance Update & FAQs	Webinar
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
Mar 21	Small Credit Union CEO Roundtable	Appleton
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
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 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	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 18	Auditing for Reg E Compliance	Webinar



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Compliance & Regulatory

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 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

Executive

Jan 23	WCULAF - Team Trivia Night Fundraiser	Madison
Jan 24-25	2019 State Governmental Affairs Conference	Madison, WI
Feb 6	CAMELS Rating for Executives	Webinar
Feb 7	ACH Tax Refund Exceptions, Posting & Liabilities	Webinar
Mar 5	Strategic Decisions Regarding CECL Methodologies, Processes & Governance	Webinar
Mar 10-14	CUNA GAC	Washington, DC
Mar 19	Women's Leadership	Wausau
Mar 21	Small Credit Union CEO Roundtable	Appleton
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 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



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Finance & Accounting

Jan 23	WCULAF - Team Trivia Night Fundraiser	Madison
Jan 23	Determining Cash Flow from Personal Tax Returns After 2018 Tax Reform Part 1: Schedules A, B & C	Webinar
Jan 24-25	2019 State Governmental Affairs Conference	Madison, WI
Feb 6	CAMELS Rating for Executives	Webinar
Feb 7	ACH Tax Refund Exceptions, Posting & Liabilities	Webinar
Feb 19	Determining Cash Flow from Personal Tax Returns After 2018 Tax Reform Part 2: Schedules D, E & F	Webinar
Feb 27	ACH Dispute Resolution	Webinar
Mar 10-14	CUNA GAC	Washington, DC
Mar 13	2019 ACH Rules Update	Webinar
Mar 19	Women's Leadership	Wausau
Mar 21	Small Credit Union CEO Roundtable	Appleton
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 16	Processing IRA Rollovers & Transfers	Webinar
Jul 23	Call Report Preparation: Avoiding Common Errors	Webinar
Aug 1	IRA Reporting, Common Issues & Error Resolution	Webinar
Aug 20	How to Handle Unauthorized Electronic Fund Transfers Under Reg E	Webinar
Aug 21	The Financial Statement Audit Process	Webinar
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
Oct 16	Reg E Requirements for Debit Card Error Resolution: Processing, Disclosure & Investigation	Webinar
Nov 7	Understanding & Navigating ACH Rules for ODFIs	Webinar
Dec 3	ACH Error Resolution: Returns, Authorizations, WSUDs, Stop Payments & More	Webinar
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HR & Training

Jan 23	WCULAF - Team Trivia Night Fundraiser	Madison
Jan 24-25	2019 State Governmental Affairs Conference	Madison, WI
Apr 29	Hacking the Weakest Link: The Role of Staff in Maintaining IT Security	Webinar
Mar 10-14	CUNA GAC	Washington, DC
Mar 19	Women's Leadership	Wausau
Mar 21	Small Credit Union CEO Roundtable	Appleton
May 8-11	League Annual Convention	Lake Geneva, WI
Jun 11	Essential HR Recordkeeping from Hiring to Firing	Webinar
Jun 19	HR Webinar	Webinar
Sep 18	HR Webinar	Webinar
Sep 25	Hiring in the Digital Age: What Every HR Manager Needs to Know About Social Media	Webinar

IT & Security

Jan 15	FFIEC Exam Procedures for Business Continuity	Webinar
Jan 23	WCULAF - Team Trivia Night Fundraiser	Madison
Jan 24-25	2019 State Governmental Affairs Conference	Madison, WI
Jan 31	Frontline Fraud Prevention: Stopping Fraud at the Teller Line	Webinar
Feb 12	Risks & Precautions for Endorsements & Other Negotiable Instruments	Webinar
Feb 21	The New NIST Digital Identity Guidelines: Impact on Passwords, Security Questions & Account Lockouts	Webinar
Mar 7	Federal Requirements for Tech-Based Marketing: Websites, Social Media, Robo Calls & More	Webinar
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
Mar 21	Small Credit Union CEO Roundtable	Appleton
Apr 2	Mobile Device Risks, Records & Compliance Rules: Managing Your BYOD & COPE Policies & Procedures	Webinar
Apr 29	Hacking the Weakest Link: The Role of Staff in Maintaining IT Security	Webinar
May 8-11	League Annual Convention	Lake Geneva, WI
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 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
Sep 24	Mitigating a Data Breach: Forensics & Incident Response	Webinar
Nov 20	Robbery Preparedness: Meeting Your Annual Compliance Requirement	Webinar



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Leadership

Jan 23	WCULAF - Team Trivia Night Fundraiser	Madison
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Mar 19	Women's Leadership	Wausau
Mar 21	Small Credit Union CEO Roundtable	Appleton
May 8-11	League Annual Convention	Lake Geneva, WI
Oct 8	Head Teller Training: Maximizing Teller Performance	Webinar
Nov 5	Year-End Compliance Checklist	Webinar

Lending & Collections

Jan 10	Regulator Issues & Update for the Credit Analyst	Webinar
Jan 16	2018 HMDA Submission Due March 1, 2019, Part 1: Identifying Reportable Loans, Data Integrity & FIG Analysis	Webinar
Jan 22	Successful Skip Tracing Techniques for Locating Borrowers & Recovering Collateral	Webinar
Jan 23	WCULAF - Team Trivia Night Fundraiser	Madison
Jan 24	2018 HMDA Submission Due March 1, 2019, Part 2: Requirements, Clearing Edits, Exempt Fields & More	Webinar
Jan 24-25	2019 State Governmental Affairs Conference	Madison, WI
Jan 29	Real Estate Loan Collection Rules for Lenders & Mortgage Servicers	Webinar
Jan 30	Analyzing Financial Statements for the Credit Analyst	Webinar
Feb 5	Right of Setoff on Deposit Accounts & Loans: Legal Issues	Webinar
Feb 20	Debt Service Coverage Calculations in Underwriting	Webinar
Mar 5-6	ULEND Academy	Wisconsin Dells, WI
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 21	Small Credit Union CEO Roundtable	Appleton
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	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
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



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Marketing & Business Dev.

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Mar 21	Small Credit Union CEO Roundtable	Appleton
May 8-11	League Annual Convention	Lake Geneva, 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
Sep 19	Emerging Trends & Developments in Online, Mobile & Digital Channels	Webinar
Oct 25	12 Key Elements of an Effective Digital Marketing Strategy	Webinar
Nov 6	Top 10 Compliance Mistakes in Advertising	Webinar

Member Service

Jan 8	Compliance Training for the Frontline	Webinar
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Mar 21	Small Credit Union CEO Roundtable	Appleton
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 17	Job-Specific BSA Training for the Frontline	Webinar
Aug 27	Opening Donation, Memorial & Other Accounts for Nonprofit Organizations & Corporations	Webinar
Sep 10	Managing Minor Accounts: Withdrawals, Transfers, CDD, Closing & Best Practices	Webinar
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



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