

KNOW YOUR BUSINESS

Business Accounts Seminar with Chuck Holzman



Date

Wednesday, March 16, 2016

Time

Registration & Continental Breakfast: **8:30 a.m.**
Presentations: **9:00a.m. – 12:00 p.m.**

Location

People Driven Credit Union
24333 Lahser Rd.
Southfield, MI 48033
Directional sign will be posted.

**RSVP by:
Friday,
March 11**

Cost

\$79 Per Person
(\$10 per person discount for CU Partner Solutions Affiliated Credit Unions)

Program

This program is intended to educate credit unions on the issues raised by providing account services to businesses. You will learn about required account documentation, authorized users/signers, account agreements and rules surrounding credit union business accounts. The program will provide differences between a corporation, limited liability company, partnership and a sole proprietor. It will focus on the due diligence that credit unions need to do before opening a business account, and more. This program is a must for any credit union that offers deposit services for businesses and has not had formal training on these types of accounts.

Chuck Holzman

Charles (Chuck) Holzman is the managing member and founder of Holzman Corkery, PLLC. Chuck has been representing credit unions since 1983, and has acted as legal counsel to hundreds of credit unions in Michigan and across the county. Chuck serves as Counsel to the Michigan Credit Union League and its Affiliates. Chuck also oversees all operations of the firm, and concentrates his practice in the areas of business and strategic development, merger and acquisitions, litigation, real estate, operations and other corporate representation.

Chuck has been a regular speaker at both national and international conferences and has provided in-house training to numerous credit unions. He has spoken on such topics as merger and acquisitions, strategic planning, various regulatory compliance issues, both lending and operational, and has been considered an expert in areas of loan recovery and financial institution operations.

In 2007, Chuck's peers named him one of the 2007 Michigan Super Lawyers in recognition of his hard work, dedication, commitment, and leadership. Chuck was also named one of the top attorneys in Michigan in the areas of banking, real estate and business/corporate law.

Chuck is a member of the State Bar of Michigan, and has been admitted to practice in the US District Courts for the Eastern and Western Districts of Michigan along with the Sixth Circuit Court of Appeals.

Who should attend this seminar?

Member Service Reps, Tellers, Loan Officers, and any staff who requires a better understanding of Business Accounts.

Register

 Fax, email or mail this form to:

Anne Blain Phone: 248-478-4020
Chiropractic Federal Credit Union Fax: 248-478-7632
23617 Liberty St. E-Mail: ablain@chirofcu.org
Farmington, MI 48335

Credit Union

Contact Name

E-Mail Address

Phone

Attendees:

1. _____
2. _____
3. _____
4. _____

Total Payment:

Number of attendees _____ x \$79.00 = \$ _____

***Number of attendees** _____ x \$69.00 = \$ _____
(*CU Partner Solutions affiliated credit unions.)

Please make checks payable to CU Partner Solutions and mail to Chiropractic Federal CU (see address above).

Deadline for registration is Friday, March 11, 2016.