



# CRAFTING AN EFFECTIVE COMMERCIAL LOAN WRITE-UP VIRTUAL SEMINAR

**JANUARY 26, 2022**

The first part of this virtual program will cover the basics of how to craft an effective commercial loan write-up. The session will also cover additional important loan write-up items including assessing the company's strategic plan- marketing, financing, and management. Three commercial loan write-ups will be presented in order to illustrate the concepts.

The second part of the session will review loan committee presentation skill building techniques that include the do's & don'ts of loan committee, reading the personalities of the committee members, understanding the difference between an outside versus inside committee member, and exploring group dynamics. This section will also cover the supporting disciplines of negotiation skill building, communications, and personal marketing. The presentation concepts will be reinforced through case studies.

## PART 1 OBJECTIVES:

- Review effective commercial loan write-ups
- Discuss types, styles, and components parts
- Cover the financial analysis section
- Assess the company's strategic plan
- Summarize the concepts by reviewing loan write-ups

## PART 2 OBJECTIVES:

- Gain an understanding of effective presentation skills in loan committee
- Learn to make motivating presentations and conquer fear and intimidation
- Analyze the do's and don'ts of loan committee, personality types, group dynamics
- Review the related topics of negotiation skill building, communications, and personal marketing
- Summarize the concepts through case studies

## About the Instructor



**David L. Osburn, MBA, CCRA**, is the founder of Osburn & Associates, LLC, a Business Training and Contract CFO Firm. His extensive professional background of over 30 years includes work as a Business Trainer/ Contract CFO and work as a bank commercial lender including the position of Vice President/Senior Banking Officer. His banking credentials include loan underwriting, loan work-out, management, and business development.

Mr. Osburn holds the professional designation of Certified Credit & Risk Analyst (CCRA) as granted by the National Association of Credit Management (NACM).

## WHEN

January 26, 2022  
9:00 a.m. - 3:00 p.m.

## WHERE

Comfort of your desk or  
anywhere with an internet  
connection.

## WHO SHOULD ATTEND

Commercial lenders,  
relationship managers, credit  
analysts, private bankers, and  
business development officers



## COVID-19 UPDATE

The ABA takes the health and safety of members seriously. Given the impact of the coronavirus pandemic, ABA is offering this session as a virtual course. We appreciate your understanding and flexibility, and we look forward to bringing you a great virtual seminar.



## Arkansas Bankers Association | Professional Development Department

1220 West Third Street | Little Rock, Arkansas 72201 | (501) 376-3741 | www.arkbankers.org

### REGISTRATION FEES

#### ABA Members:

Early Registration Price: \$340; After December 28: \$390

#### Non-Members:

Early Registration Price: \$680; After December 28: \$780

### CANCELLATION

Full registration fees will be refunded if a cancellation is received before January 12. No refunds will be given for cancellations made after January 12. All cancellations must be submitted in written format prior to the event.

### VIRTUAL LIVE FORMAT

Attendees will need Internet access and a standard web browser to join this video and web conferencing. They will receive an email with a link to join the virtual meeting, handouts, and any additional information a few days before the event.

You do not need your own Zoom account. You will use the link, meeting ID and password we provide.

- You can log in on a desktop computer, laptop or download the Zoom app on your smart device.
- Internet access
- Audio on computer or a phone line

## CRAFTING AN EFFECTIVE COMMERCIAL LOAN WRITE-UP

JANUARY 26, 2022

Bank/Company Name \_\_\_\_\_ Phone \_\_\_\_\_

Registrant Name \_\_\_\_\_ Title \_\_\_\_\_ E-mail \_\_\_\_\_

Registrant Name \_\_\_\_\_ Title \_\_\_\_\_ E-mail \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Registration Contact \_\_\_\_\_ Phone \_\_\_\_\_ E-mail \_\_\_\_\_

### PAYMENT INFORMATION

Charge my:

☐ Mastercard 

☐ Visa 

☐ American Express 

☐ Discover 

Account Number \_\_\_\_\_

Name on Card \_\_\_\_\_

Expiration Date \_\_\_\_\_ CSC Number \_\_\_\_\_

(3-digit security code on back of your card)

If you would prefer to give us your credit card information over the phone, please call the ABA Professional Development Department at (501) 376-3741. Please do not email credit card information.

**Note:** Non-Members must pay with credit card or check prior to the event.

**Email:** kami.coleman@arkbankers.org

**Fax:** (501) 376-9243

**Mail:** **Check Payable to:**  
Arkansas Bankers Association  
Professional Development Department  
1220 West Third Street  
Little Rock, AR 72201

#### ABA USE ONLY:

Registered: \_\_\_\_\_

Amount: \_\_\_\_\_

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