



Instructor: David McGuinn

# Top 50 Important Safe Deposit Box Operating Procedures

Course #: C1447WC—2020 UPDATE

FEBRUARY 13, 2020

10:00AM—Noon

## course description

The safe deposit operation is a unique, fast-changing service in the financial industry. It is the only product or service in which members of your staff do not know the value of a consumer's assets.

As a result, every vault transaction can lead to considerable liability. Effective procedures and sound daily practices can counteract and minimize this risk. This seminar covers the "nuts and bolts" and the recommended day-to-day operating procedures for your institution.

Dave McGuinn, a nationally recognized expert in the safe deposit area, will provide clear, concise recommendations to market this service, improve your bottom line and satisfy these consumers. In addition, he will share many success stories about concepts that have enabled institutions nationwide to improve their profitability.

Looking for more details? [Visit our website](#) for a detailed course description.

## how to enroll

Enroll online at our website, [CFTEA.org](http://CFTEA.org) under Business Skills.

## how class works

Course session runs for two hours by logging in at a computer, tablet or mobile device. The best part? It is all live! Taught by an experienced nationally known safe deposit instructor!

## tuition

\$150 per participant or \$99 for the recorded instructor led program. (Normal cost is \$295 per participant. Take advantage of these specially rates!)

## withdrawal policy

CFTEA withdrawal policy is outlined within our latest catalog and on our website. Before class begins the enrollment may be transferred to another student with the approval of the student's employer and the CFTEA office.

## Would you like to know more about new educational career paths?

Visit us at [cftea.org](http://cftea.org) and follow us on Facebook!

# SPRING 2020 Registration and Offerings

## Select courses to register

### January 2020

- Residential Mortgage Lending Webcourse starts 1/4/2020
- Accounting (\$100 Off Sale) Webcourse starts 1/20/2020
- 40 Steps to Make Safe Deposit Boxes a Profit Center Webcourse 1/29/2020 (Special pricing discount)
- Commercial Lending Webcourse starts 1/30/2020

### February 2020

- IRA Fundamentals—Machias, Maine 2/5/2020
- Medallion Signature Guarantee—Montpelier, Vermont 2/5/2020
- Notary Public Workshop—Montpelier, Vermont 2/5/2020
- Top 50 Important Safe Deposit Box Operating Procedures Webcourse –2/13/2020

### March 2020

- Quality Service Webcourse starts 3/4/2020
- IRA Fundamentals—Montpelier, Vermont 3/10/2020
- IRA Advanced—Montpelier, Vermont 3/11/2020
- IRA Fundamentals—Augusta, Maine 3/11/2020
- IRA Fundamentals—Rutland, Vermont 3/11/2020
- HSA Fundamentals—Montpelier, Vermont 3/12/2020
- Top 25 Safe Deposit Compliance Issues Webcourse 3/17/2020
- Written Communication Webcourse starting 3/17/2020
- IRA Fundamentals—Rockport, Maine starting 3/18/2020
- Modern Supervisor—New Gloucester, Maine starting 3/24/2020
- IRA Fundamentals—New Gloucester, Maine 3/31/2020

### April 2020

- Consumer Lending Webcourse starts 4/1/2020
- IRA Advanced—New Gloucester, Maine 4/1/2020

### April 2020

- HSA Fundamentals—New Gloucester, Maine 4/2/2020
- Legal Foundations in Banking Webcourse starting 4/2/2020
- Modern Supervisor—Gilford, New Hampshire starts 4/9/2020
- Enhance Your Potential, Build Your Leadership Narrative Certificate—New Gloucester, Maine starts 4/16/2020
- 30 Steps to Audit a Safe Deposit Department Webcourse 4/22/2020
- Communicate with Confidence, Comfort and Conviction—New Gloucester, Maine 4/22/2020

### May 2020

- Branch Manager Bootcamp—New Gloucester, Maine starts 5/6/2020
- Structuring Commercial Loan Packages—New Gloucester, Maine 5/20/2020

## REGISTRATION - Scan to [tammy@cftea.org](mailto:tammy@cftea.org)

Name: \_\_\_\_\_

Organization: \_\_\_\_\_

Month of Birth: \_\_\_\_\_ Day of Birth: \_\_\_\_\_

Email: \_\_\_\_\_

Contact Phone: \_\_\_\_\_

Register for courses selected above or another course and code:

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Approval Signature:

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