NATIONAL
CONSULTING LIMITED

Estate Admin (Virtual Session)

The registration fee is $575 – includes: course materials (which will be distributed electronically).

Location & Date:

March 22nd, 2023
8:30 am – 4:30 pm

We will be using Microsoft TEAMS for this session

Course Description:

This course is designed to assist credit union professionals upon receiving notification of the death of an account holder. There are certain procedures one should be following to ensure the deceased accounts are properly handled and the credit union is protected.

Course Outline:

- Dealing with joint accounts
- Dealing with estate representatives
- Will vs. no will
- Probate
- Operational procedures
- Documentation completion
- Releasing funds
- Collecting indebtedness to the credit union
- Tax issues
- Legal considerations
- And much more …

Delivered by lawyers Lindsay Oliver and Randy Sandbeck, both partners with Oliver Waller Zinkhan & Waller LLP.