

Mutual 1<sup>st</sup> Federal, 14510 F Street, Omaha

September 17-18, 2019

8:30am-4:30pm / 8:30am-2:00pm

## What is ULEND?

ULEND Academy is a lending GAME CHANGER. No more wasted hours in classes with great ideas that are hard to implement in real life! ULEND Academy is a hands-on, customized experience that propels lenders from transactional to consultative, meeting members' full financial needs. The curriculum guides lenders from foundational to advanced skill levels in all lending channels and across all stages of the loan process - origination, underwriting, and closing - with cross-selling, consultation, and compliance woven throughout.

ULEND Academy is set up as a hands-on workshop where participants will discuss, learn, and then apply. This occurs throughout the two days, so application can happen *immediately*. ULEND Academy graduates will walk out knowing how to use the skills and concepts learned in their daily interactions with members.

**Are you ready to empower your lenders to create and keep loyal members through an EXCEPTIONAL MEMBER EXPERIENCE?**

## Who Should Attend?

EVERY lender from new to seasoned, underwriters and leaders! ULEND Academy is a unique lending experience aimed at helping all lenders, from all levels and various experiences get better at what they do every day.

## Sessions and Descriptions

### 1- Social Savvy

- Recognize personal style and how it is perceived by others
- Identify other styles and comfortably interact with members
- Deliver targeted communications for the appropriate medium and context

### 2- Plan & Prep

- Utilize the information from your core system
- Identify what to look for to analyze the needs of your member
- Prepare when there is no time to plan

### 5- Underwriting

- Recognize opportunities to take smart risks
- Utilize the 5 C's of credit when analyzing the loan application
- Formulate alternatives that positively impact loan decisions

### 6- Present the Right Solution

- Connect products and services to members' needs and life stages
- Build creative options/personalized packages for every member
- Find ways to say yes to the member

### 3- Consultation

- Uncover member needs with targeted questioning strategies
- Identify the life stages & goals of your members
- Review the credit report and positively influence the member's score

### 4- Structure the Loan

- Calculate & effectively use basic ratios that apply in lending
- Identify the 5 C's of credit that translate to risk
- Use compensating factors to build a loan that will be approved for all members

### 7- Close with Purpose

- Personalize the experience to the unique needs of the member
- Make appropriate referrals and follow-up as needed
- Set expectations to connect with the member on future opportunities

### 8- Hands-on Application

- Apply the skills immediately during hands-on learning
- Receive immediate feedback from real-time coaching
- Discuss how each step of the member experience applies across the various lending channels

## Educational Investment

- **\$369** per attendee (*sharing cost between 2 attendees for different days is not permitted*)
- Included in the cost is any and all ULEND materials, continental breakfast and lunch each day

## Registration

To register, please go online to:

- <https://nebrcul.org/events/ulend-academy/>

## Additional Information

### HOTEL

Each individual is responsible for their own hotel arrangements. A suggested hotel nearby would be Holiday Inn Express, 13131 I Street, 402-999-4800.

### ATTIRE

Business casual, jeans acceptable. Be sure to bring a sweater, as personal comfort levels vary.

### CANCELLATION

Refunds will be issued until 10 days prior to the conference, less a \$100 administration fee per person. Substitutions accepted up to 2 weeks prior. All cancellations and substitutions must be submitted in writing.

## Additional Resources

[Webpage](#)

[Product Overview](#)