Estate Admin Law for Credit Unions

The registration fee is $575 (1 day) – includes: course materials, lunch and coffee break refreshments.

Location and Date:

Regina, The Atlas Hotel (formerly The Travelodge Hotel)
October 21st, 2020
Session begins at 8:30am and runs until 4:30pm

Course Description:

This one-day 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 **Pat Quaroni and Randy Sandbeck, Olive Waller Zinkhan & Waller LLP,** the course will be a combination of lecture and group work.