



# GENERAL BULLETIN

CONNECTICUT  
BANKERS  
ASSOCIATION  
10 Waterside Drive  
Farmington, CT 06032-3083  
(860) 677-5060  
FAX: (860) 677-5066

2019 – 45

May 7, 2019

TO THE CHIEF EXECUTIVE OFFICER  
OR INDIVIDUAL ADDRESSED

RE: **2019 Uniform Power of Attorney Act Workshop**  
**Red Lion Hotel, Cromwell, CT**

**SENT TO:**

CEO, CEO+, Admin,  
Compliance, Associate  
Member, Legal

The Connecticut Bankers Association is pleased to announce that we will be holding the **2019 Uniform Power of Attorney Workshop** on Thursday, June 13, 2019 at the Red Lion Hotel, Cromwell, CT. This important program will discuss the vital changes to Power of Attorney laws and regulations. Registration for this program will begin at 8:30 a.m. with the workshop starting promptly at 9:00 a.m.

**WORKSHOP OVERVIEW**

Connecticut adopted the Uniform Power of Attorney Act (UPOA) several years ago. The UPOA contains comprehensive provisions regulating the creation and use of powers of attorney in Connecticut. Topics to be covered will include the legislative history and general overview of the Uniform Power of Attorney Act, including the circumstances under which financial institutions are required to accept powers of attorney; key provisions affecting the creation, validity and termination of powers of attorney; provisions that protect financial institutions from liability; practical and risk management observations in handling powers of attorney from a banker's perspective.

**SPEAKERS**

Presenting this important program will be Art Corey, Counsel at Hinckley, Allen & Snyder, LLP. Art is a banking law attorney and regularly advises financial institutions on handling powers of attorney related to customers and their accounts. Art assisted the Connecticut Bankers Association in the review and negotiation of the provisions of Connecticut's Uniform Power of Attorney Act. He will provide attendees with a detailed analysis offer feedback for your questions and concerns regarding these important items.

Joining Art will be Krista Moran of Simsbury Bank. Krista is the Vice President, Compliance Officer at Simsbury Bank and on the Board of Directors for the Bank Compliance Association of CT. Krista started her career in banking at the First National Bank of Litchfield working in Deposit Operations, Loan Operations and finally the Compliance department. At Simsbury, Krista works with all departments to streamline compliance responsibilities for their areas.

**WHO SHOULD ATTEND**

This is an important program for a broad cross-section of departments including Compliance, Senior Officers, Branch Administration, Legal Counsel, Risk employees and anyone else that may have direct access to customers when dealing with Power of Attorney questions, issues, or resolutions.

**REGISTRATION DETAILS**

The **2019 UPOA Workshop** will be held on Thursday, June 13, 2019 at the Red Lion Hotel, Cromwell, CT from 8:30 a.m. to 12:00 p.m. The enclosed registration form should be completed and returned to the Association office no later than **Friday, June 7, 2019**. For credit card payments, please register [online](#). If you cannot, you may complete this form and fax to our secure fax line (860) 677-5066. **We cannot accept registrations with credit card payments via unsecure emails.** The fee is outlined on the attached registration form and includes all program materials, refreshments and applicable Connecticut State sales tax. All registrants will be billed regardless of their attendance. Should you have any questions regarding the program or registration procedures, please don't hesitate to contact me at the Association office.

Sincerely,  
Kimberly Tuttle  
Director of Education

# CONNECTICUT BANKERS ASSOCIATION

## MEETING REGISTRATION FORM

10 Waterside Drive, Farmington, CT 06032-3083

Telephone: (860) 677-5060 Fax: (860) 677-5066



**TITLE:** 2019 Uniform Power of Attorney Act Workshop

**DATE:** Thursday, June 13, 2019

**REGISTRATION TIME:** 8:30 a.m.

**PROGRAM TIME:** 9:00 a.m. – 12:00 p.m.

**LOCATION:** Red Lion Hotel, Cromwell, CT

**REGISTRATION DEADLINE:** Friday, June 7, 2019

**REGISTER ONLINE >**

<u>NAME (please print)</u>	<u>TITLE</u>	<u>BADGE NAME</u>	<u>EMAIL*</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Company: \_\_\_\_\_

Address: \_\_\_\_\_

Completed by: \_\_\_\_\_ E-mail: \_\_\_\_\_

### REGISTRATION FEES

**CBA Member:** \$145.00/person x \_\_\_\_\_ Person(s) = \$ \_\_\_\_\_ (\$136.34 + 6.35% CT State Sales tax)

**Non-Member:** \$290.00/person x \_\_\_\_\_ Person(s) = \$ \_\_\_\_\_ (\$272.68 + 6.35% CT State Sales tax)

### MEMBERSHIP

**CBA Member:** A banking institution who is a regular member of the Association. Also includes Associate Members (a corporation, association or individual not eligible for regular membership, who has applied and been accepted for Associate Membership.)

**Non Member:** A banking institution who is not a current regular member of the Association. Also includes a corporation, association or individual who is not a current Associate Member.

**\*Confirmation sent if Email address is provided above**

*The fee includes all program materials, refreshments, and Connecticut State sales tax.*

### PAYMENT METHOD

Please select method of payment:  Check  Visa  MasterCard  American Express  [ONLINE at ctbank.com](#)

Card Number: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Amount: \$ \_\_\_\_\_ Security Code: (3 digits on back of card) \_\_\_\_\_

Billing Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Cardholder Signature: \_\_\_\_\_

~~ Please make checks payable to: Connecticut Bankers Association ~~

### REFUND/CANCELLATION POLICY

<b>Refunds:</b>	No refunds will be made for cancellations received within two business days of the program.
<b>Cancellations:</b>	A \$45.00 per person cancellation fee will be charged
<b>Substitutions:</b>	Registrants may send a substitute to the program without loss of program fees. Please call in advance whenever possible.
<b>Non-Attendees:</b>	Registrants who do not attend the scheduled program will not receive a refund of program fees, but may request program materials.

### DIRECTIONS TO THE RED LION HOTEL, CROMWELL (860) 635-2000

<b>From Hartford:</b>	I-91 South to Exit 21. Left at end of ramp. After first light, hotel located immediately on left.
<b>From New Haven:</b>	I-91 North to Exit 21. Left at end of ramp. Hotel located immediately on left.
<b>From Waterbury/ Danbury:</b>	I-84 East to Route 691 East. Follow to I-91 North to Exit 21. Left at end of ramp. Hotel immediately on left.
<b>From New Britain:</b>	Route 72 East/Route 9 South to Route 372 East (Berlin/Cromwell). Hotel located approximately 4 miles on left.