



GENERAL BULLETIN

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

2019 – 75

October 8, 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 Friday, November 15, 2019 at the Red Lion Hotel, Cromwell, CT. This important program will discuss provisions of the Power of Attorney laws and regulations that are important to banks. Registration for this program will begin at 8:30 a.m. with the workshop starting promptly at 9:00 a.m.

WORKSHOP OVERVIEW

The Connecticut Uniform Power of Attorney Act (UPOA) became effective in 2016. 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, Vice President & Counsel, Connecticut Bankers Association. Art is a banking law attorney and spent years in private practice advising financial institutions on handling powers of attorney related to customers and their accounts. Art assisted in the review and negotiation of the provisions of Connecticut's Uniform Power of Attorney Act. Joining Art will be Kasey L. Beckendorf, Director of Compliance at Union Savings Bank. Together, they will provide attendees with a detailed analysis and offer feedback for your questions and concerns regarding powers of attorney.

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 Friday, November 15, 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, November 8, 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: Friday, November 15, 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, November 8, 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

Refunds:	No refunds will be made for cancellations received within two business days of the program.
Cancellations:	A \$45.00 per person cancellation fee will be charged
Substitutions:	Registrants may send a substitute to the program without loss of program fees. Please call in advance whenever possible.
Non-Attendees:	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

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