

Marketing Compliance

What do you get when you combine an award winning newsletter writer with an NCUA examiner? Compliance training that doesn't cramp your style!

This session sorts the alphabet soup of regulations by the products & services they cover.

Marketing Compliance Areas covered are:

- General Requirements
- Truth-in-Savings: Regulation DD
- Deposit Insurance
- Overdraft Programs w/ [NEW Courtesy Pay Requirements](#)
- Equal Credit Opportunity: Regulation B
- Truth in Lending: Regulation Z
- Real Estate Related Lending

The day starts an evaluation of each participants existing knowledge, continues with explanations of regulatory requirements, then divides into small groups to review ads done by others and make corrections. After discussing findings and identifying common pitfalls, the correct answers to the morning quiz are given and all misunderstandings clarified.

[Participants find they retain more regulation information because they apply the requirements in class to a packet of real life examples of credit union marketing materials and get immediate feedback on their decisions.](#)

Carolyn Warden is an oft-published author, and an award winning CU newsletter writer & publisher. Her credit union experience began as an NCUA examiner specializing in consumer compliance regulations, over 25 years ago.

Through her consulting practice Carolyn helps credit unions become [financially stronger and master](#) service delivery by training and coaching managers to lead others through organization-wide and life enhancing change.