



Capitol Area  
chapter credit unions

**Attention: Credit Union Professionals**

**The Capitol Area Chapter invites all Michigan Chapters to attend the following workshop:**

**Specialty Account Training**

**Thursday, May 9, 2019**

**Facilitated by Chuck Holzman, Holzman Law**

*Chuck Holzman will discuss how the aging of the Baby Boomer population and their desire to protect their assets and provide direction to their heirs has resulted in increased use of trusts and power of attorney documents. This program will concentrate on the issues involving their use. It will provide guidelines to assist your credit union when opening trust accounts, how to handle members or third parties that desire to use a power of attorney, and how to reduce risk while serving the needs of the member. Guardians, conservators and other representative account issues will also be discussed. As an attendee, you will also have the opportunity to participate in a Q & A forum to address any outstanding questions regarding specialty accounts. Prior to the session, questions can be submitted to [kboswell@pfcu4me.com](mailto:kboswell@pfcu4me.com)*

**Session Information:**

**Training Location:** MSUFCU- 1.800.678.4968  
3777 West Road  
East Lansing, MI 48823

**Session Time:** 9:00 a.m. to 12:00 p.m.  
*Registration begins at 8:30 a.m. with a light breakfast provided*

**Cost:** \$49 for Capitol Area Chapter members and \$59 for other chapter participants  
**Deadline to register is May 6, 2019**

*Individuals wishing to attend this meeting that require special accommodations, please contact Heather Spitzley at 517.647.7571*

To attend, please send your reservation and check payable to Capitol Area Chapter of Credit Unions:  
Attention: Darcie Vinten-Johansen  
CASE Credit Union  
4316 S. Pennsylvania Ave. Lansing, MI 48910  
Ph: 1.888.393.7716 • email: [dvintenjohansen@casecu.org](mailto:dvintenjohansen@casecu.org)

\_\_\_\_\_ Attendees x \$  
 \_\_\_\_\_ Attendees x \$  
 TOTAL \$ \_\_\_\_\_

Credit Union \_\_\_\_\_ Contact Person \_\_\_\_\_

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

Please include name of each attendee:

Name \_\_\_\_\_ Name \_\_\_\_\_

Name \_\_\_\_\_ Name \_\_\_\_\_

Name \_\_\_\_\_ Name \_\_\_\_\_