

COMMERCIAL AND INDUSTRIAL LENDING IN TODAY'S COMPETITIVE MARKET

Virtual Workshop

JUNE 23 | 9 am - 3 pm

This workshop will begin with a brief overview of Commercial and Industrial (C&I) loan products including working capital lines of credit, ABL facilities, and equipment financing (loans/leases) and their typical structure. The training session will also cover underwriting C&I loans including accounts receivable assessment and the use of a "Borrowing Base Certificate" (basic and advanced models), the valuation and quality of inventory, and the analysis of various equipment-related issues in lending. This portion of the webinar will also cover the proper evaluation of the borrower's financial statements. Additionally, the webinar will cover documentation of C&I loans, collateral concerns, challenges with pricing, and managing the C&I loan portfolio. The webinar will conclude with a review of how to identify and market to new C&I loan prospects in today's competitive market.

Objectives:

- Review C&I lending
- Discuss C&I loan products and their typical structure
- Explore underwriting C&I loans including accounts receivable, inventory, and equipment financing
- Analyze the Borrowing Base Certificate (BBC)
- Evaluate the borrower's financial statements
- Review the documentation, collateral, pricing, and managing of C&I loans
- Develop the marketing of C&I loans in today's economy

Audience

Commercial lenders, credit analysts, loan documentation specialists, branch managers, private bankers, and business development officers.

About the Instructor

David L. Osburn, MBA, CCRA
Osburn & Associates, LLC

David is the founder of Osburn & Associates, LLC, a business training and contract CFO firm. His extensive professional background of over 30 years includes work as a business trainer/ contract CFO and work as a bank commercial lender including the position of vice president/ senior banking officer.

Schedule

8:45 a.m.	Zoom Login
9 a.m.	Seminar begins
Noon	Lunch
12:30 p.m.	Seminar resumes
3 p.m.	Seminar adjourns

Virtual Live Format

Attendees will need internet access and a standard web browser to join this video and web conferencing. Attendees will receive an email with a link to join the virtual seminar, handouts, and any additional information a few days before the event.

A personal Zoom account is not necessary. You will use the link, meeting ID, and password we provide.

- You can log in on a desktop computer or laptop or download the Zoom app on a smart device.
- Internet access
- Audio on a computer or a phone line

Registration and Pricing Information

Check here for the MEMBER BANK ALL-ACCESS PASS: \$850 (Need a main contact/registrant)

The All-Access Pass includes recording and presentation slides.

Member: \$340 per person

Non-Member: \$1,360 per person

Approximately 2 days before the program, you will receive a link to the online presentation.

Notice is required for all substitutions/cancellations. If the cancellation request is received by the NBA Education Center at least 5 days prior to the program date, the full fee will be refunded. After that date, the refund is subject to a 50% cancellation fee per registrant. Substitutions are welcomed.

(Please register online or use the form below)



COMMERCIAL AND INDUSTRIAL LENDING VIRTUAL Workshop

June 23, 2025
9:00 am – 3:00 pm

12/04/2024

Financial Institution: _____

Bank / Branch Address: _____

City/Town: _____ Zip: _____

Phone# (_____) _____

Check here for the MEMBER BANK ALL-ACCESS PASS: \$850 (Need a main contact/registrant)

Member: \$340 per person

Non-Member: \$1,360 per person

Please register the following:		Email Address
FIRST NAME	LAST NAME	

ONLINE YOU MUST LOG IN TO RECEIVE MEMBER DISCOUNTED PRICING!

TOTAL DUE \$ _____

Four Ways to Register:

- FAX: (402) 474-2148
- MAIL: NBA Education Center,
PO Box 80008, Lincoln, NE 68501
- PHONE: (402) 474-1555

WEBSITE:
www.nebankers.org
→ Education →
Event Calendar

Payment Choice (check one):

☐ MasterCard ☐ VISA ☐ Discover ☐ American Exp.

Cardholder Name: _____

Card Number: _____ CVV: _____

Exp. Date: _____ Signature: _____