

# Loan Assistant and Loan Processors Workshop

November 20 | Courtyard By Marriott, Columbia



## OVERVIEW

This workshop is designed to provide lending knowledge and administrative effectiveness of one of the most important positions in a community bank's lending staff – the loan assistant/loan processor. All of the objectives of this program are directed at increasing the performance effectiveness of these individuals.

## TOPICS

- the loan assistant's primary role in loan origination and bank profitability.
- the loan assistant's role in developing and maintaining effective, working partnerships with lenders.
- the loan assistant's role in regulatory safety and soundness operations and compliance with federal lending regulations.
- a sample review of the primary loan documentation for consumer, residential and small business loans.
- a variety of lending resources to increase the lending knowledge of loan assistants.

## SCHEDULE

9 a.m.	Program begins
10:30 a.m.	Break
10:45 a.m.	Program resumes
Noon	Lunch (on your own)
1 p.m.	Program resumes
3 – 3:30 p.m.	Adjourn

## HOTEL INFORMATION

Courtyard by Marriott  
3301 LeMone Industrial Blvd.  
Columbia, MO 65201  
573-443-8000



The block of rooms is reserved for this event until Saturday, November 1, 2025, at which time they will be released for public sale. The availability of rooms cannot be guaranteed after this date! Early reservations are encouraged! The room rate is \$109.

## WHO SHOULD ATTEND

**loan assistants and loan processors, credit administration supervisors and other members of the bank's loan support staff with credit administration responsibilities**

## RESOURCES

- lending risk management and regulatory websites
- sample loan documentation
- sample loan policy narrative
- sample credit administration guidelines
- sample loan underwriting guidelines and documentation procedures
- sample loan closing checklists
- sample post-closing loan review format

## PRESENTER



Adam Trower recently moved to CFO of Gateway Management Group which operates privately-held companies in St. Louis, Tampa, and Orlando. Previously he served as Senior Vice President/Director at Community State Bank of Missouri. His 17-year banking career has been primarily focused on lending, but he has also served on the bank's ALCO

committee for over ten years and worked in branch management, investments, and marketing. In 2014 he was honored with MBA Young Banker of the Year award and is a 2012 graduate from the MBA Bank Leadership Missouri. Additionally, he has served on various MBA boards and committees throughout the past 15 years, including currently chairing the MBA Services Corporation Board. Adam graduated from St. Louis University with a BA in Business Administration-Finance and the Barret Graduate School of Banking in Memphis, TN.

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## DISABILITIES & DIETARY RESTRICTIONS

If you have any disabilities or dietary restrictions, please contact Eric Lawson at 573-636-8151 or [elawson@mobankers.com](mailto:elawson@mobankers.com)

## QUESTIONS

Please contact Eric Lawson at the MBA Education Department at 573-636-8151 or [elawson@mobankers.com](mailto:elawson@mobankers.com) if you have any questions.




## DRESS ATTIRE

Dress is business casual. It is recommended that you bring a sweater or jacket to the sessions. Meeting room temperatures and personal comfort zones vary widely.

## CANCELLATIONS

Full refunds will be granted for cancellations received by MBA at least 10 days prior to the workshop date. After that date, an administrative fee of \$15 per canceled registration will be retained. Cancellations will not be accepted four days before the workshop. Substitutions are always permitted.

### Three Ways to Register

-  573-636-8151
-  [mobankers.com](http://mobankers.com)
-  Mail check payable to Missouri Bankers Association and form to:  
Missouri Bankers Association  
P.O. Box 57  
Jefferson City, MO 65102

# REGISTRATION FORM

Please PRINT or TYPE below. You may photocopy this form for additional registrants.

## Organization Information

Bank \_\_\_\_\_ Phone \_\_\_\_\_

Address \_\_\_\_\_ City/State/ZIP \_\_\_\_\_

## Name of Attendees

Name \_\_\_\_\_

Title \_\_\_\_\_

Email \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Email \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Email \_\_\_\_\_

## Registration Fees

Member Pricing.....\$295 # \_\_\_\_\_ \$ \_\_\_\_\_

Nonmember Pricing.....\$1,180 # \_\_\_\_\_ \$ \_\_\_\_\_

Total Amount Due..... \$ \_\_\_\_\_

### Payment Choice (check one):

- ☐ Check enclosed, payable to MBA.
- ☐ Bill Institution
- ☐ Credit Card Payment\* (Please type.)

Exp. Date \_\_\_\_\_ CVC \_\_\_\_\_

No. \_\_\_\_\_

Type Name \_\_\_\_\_

Signature \_\_\_\_\_