

Update your knowledge

What new laws or regulations are likely to impact your credit union? What is your regulator excited about these days? What scams are the bad guys perpetrating against financial institutions this year? John Eliason can help you stay current so your credit union can better serve its members.

Learn from experience

John Eliason might not have seen it all, but he's seen a lot of it. His practical advice – presented in plain English – is drawn from real claims and litigation situations, not from vague theoretical “what ifs.” His insights and ideas can help credit unions spot red flags, avoid pitfalls, and solve problems.

John W. Eliason
7330 Cedar Creek Trail
Madison, WI 53717

John W. Eliason, JD

Legal guidance **for**
today's credit unions

Learn from each other

John Eliason's workshops permit participants to explore difficult topics in a safe environment. Participants learn from one another, guided by John's expertise and litigation experience. This creates networking opportunities that yield insights far richer than those of ordinary after-meeting conversations.

Choose your format

Most of John Eliason's programs can be adapted to meet your format needs, from a 30-minute overview of key issues to a full-day interactive workshop.

“I particularly like your method of presenting case problems and asking the groups to deal with them.”

– League Education Director

John W. Eliason, JD



Base Madison, WI
Range \$750 - \$3,000

Praise

“What a terrific program you presented! You delivered everything I expected and then some!”

- Conference planner

“Thanks again. What you have to say is so important!”

- Association attorney

“Our members won’t soon forget your excellent presentation. Will you please speak at our next conference?”

- Association executive

Contact

John W. Eliason
7330 Cedar Creek Trail
Madison, WI 53717
608.827.0873
JohnWEliason@hotmail.com

John W. Eliason, attorney, mediator, and consultant, presents complex legal concepts in plain English. His skill in presenting timely and topical information in a way that is both instructive and engaging has made him a highly-regarded international speaker on the legal issues facing credit unions. For twenty-eight years at CUNA Mutual Group, John acted as defense attorney for credit unions and credit union directors, officers and employees. As Vice President of External Legal Affairs and Associate General Counsel, he headed the Litigation Team for nine years and led the team which managed and, finally, settled the Rhode Island crisis, the most complex litigation – and largest settlement – in CUMIS’s property and casualty history. John is affiliated with Rich Woldt’s Risk Management Learning Center (www.rmlearningcenter.com), a clearing-house of experts in risk management.

Seminar Topics and Workshops

Each topic can be developed for diverse groups or tailored to the specific interests of credit union directors, volunteers, staff, or attorneys.

Responsibilities and Risks: A Director’s Duties

Election to a board of directors, though an honor, is not honorary. State and federal statutes create responsibilities for board members that might make them vulnerable to significant liabilities. This primer for new directors – and welcome refresher for veterans – is John’s most requested program, available in formats ranging from a 30-minute talk to a half- or all-day participative workshop. Through examples and exercises drawn from actual litigation cases, attendees will learn about:

- Board duties specified by state and federal laws
- Court-created rules regarding director performance and liability
- Insurance coverage that can protect you as a director
- Guidelines for protecting your credit union from litigation
- Ideas for fostering a good relationship with your regulators

(30 minutes to six hours)

Effective Boards: Managing vs. Micromanaging

The health of every credit union depends on a sensible balance of board involvement and staff autonomy. Directors and staff will hear a practical perspective on appropriate levels of board participation and will learn to recognize warning signs that the board is not involved enough – or too involved. (30 minutes to one hour)

E-Commerce: Risk That Knows No Rest Internet account access, bill payment, and transaction capabilities are services credit unions need to provide to stay competitive. But offering e-commerce solutions opens your credit union to risks of fraud 24 hours a day, seven days a week. To compete safely, credit unions must “harden” their web sites by establishing the same state-of-the-art security that banks do. Seminar participants will learn about:

- Identifying areas of vulnerability
- The NCUA “Cyberservices” audit
- Finding experts to help your credit union manage risk

(30 minutes to three hours)

The Care and Feeding of Regulators Most regulator “exceptions” are well-taken. But when disputes arise, a good working relationship with your regulator is essential for resolving them without creating future problems. This seminar offers sensible recommendations for disagreeing carefully, communicating clearly, and respecting the chain of command. (30 minutes to three hours)

Your Topic Here John has presented alongside regulators, other attorneys, and experts in credit union operations. Whether your credit union is looking for a seminar on a legal topic not listed above or wants to create a partnered presentation or panel discussion with specialists in other areas, John can help you put it together.

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