

***This Month Only:***

**Compliance & Software Forum Sessions Offered Through Convenient Webinar Format**

The [2016 Loan and Mortgage Software & Compliance Forum](#) was a huge success and we're glad so many of you joined us for this annual event. If you were unable to attend, or perhaps didn't have a chance to participate in every session you would have liked to, we've got great news: We're offering encore presentations of two of our most popular forum sessions—and you won't even have to leave your office to take advantage of this limited-time opportunity.

Facilitated by the [FIPCO Education and Training Department](#), each 2-hour webinar will be conducted utilizing WebEx technology, offering the greatest in convenience and flexibility. "We're excited to connect with our software users to share this important information," said FIPCO Training Coordinator, Alice Hamilton. "Using a web seminar format provides an efficient and very effective method for participants to receive an abundance of information in a very short period of time."



FIPCO® Training Coordinator **Alice Hamilton** facilitates a recent instructional webinar.

[Online registration](#) is now open for the following encore presentations:

**Advanced Commercial and Agricultural Loans** – This informative session will focus on:

- Nested Entities
- Commercial Loans – loaded with various types of signers and collateral
- Lines of Credit – with helpful cross referencing between screen fields and forms

[Dec. 8, 9-11am](#) and [Dec. 15, 1-3pm](#)

**Real Estate** – This session will focus on:

- Second Homes
- Construction
- Construction with Permanent

[Dec. 12, 9-11am](#) and [Dec. 22, 1:30-3:30pm](#)

An unlimited number of attendees can participate for just \$199 per WebEx connection per session. And because travel expenses are virtually eliminated, it's truly a cost-effective and convenient educational opportunity. Prior to the webinar of your choice, you'll be provided with a link for printing session handouts. For even greater value, purchase the complete [2016 Loan & Mortgage Compliance and Software Forum notebook](#) containing all the materials from the entire 2-day conference (while supplies last.)

Questions may be directed to the [FIPCO Education and Training Department](#) at (800) 722-3498.

***Time to Budget for 2017!***

The New Year is quickly approaching. As you assess your institution's needs for 2017, keep in mind the many ways our innovative loan and mortgage origination and deposit account opening software suite can benefit your organization.

*Compliance Concierge™...*

- is the only platform with trusted Wisconsin Bankers Association (WBA) forms incorporated into the system.
- includes TISA Disclosures for inquiries and CD renewals.
- includes Customer Summary Reports for customer due diligence (BSA).
- offers Ascensus IRA, HSA and CESA forms completed with WBA account opening documents.
- offers the FIS QualifFile interface to verify that a customer does not have a history of negative banking relationships.
- provides various Account Maintenance options such as suspicious activity report, wire transfer requests, hold notices and more.
- comes with the best service around! You'll always speak immediately with one of our knowledgeable staff, or receive a callback within the hour for quick, friendly, and accurate compliance support.

Most importantly, our ownership of *Compliance Concierge™* means we're empowered to facilitate timely enhancements based on your needs and feedback. To learn more or to schedule a personal product demo, [contact us today](#) at (800) 722-3498.

**Holiday Software Support/ Customer Service Reminder**

- Saturday, Dec. 24th – FIPCO will provide on-call software support service from 8am – noon by dialing (800) 722-3498.
- Monday, Dec. 26th – FIPCO offices closed. No software support or on-call services.
- Tuesday, Dec. 27th – Saturday, Dec. 31st – Regular weekday/ weekend software support and customer service hours.
- Monday, Jan. 2nd – FIPCO offices closed. No software support or on-call services.

We will resume regular weekday/ weekend software support and customer service hours on Tuesday, Jan. 3rd, 2017. Questions may be directed to the [FIPCO Software Support Department](#) at (800) 722-3498. We wish you all the best this holiday season!

## 2017 Financial Directories Scheduled for January Release

Place your pre-order today to ensure timely delivery.



Be sure to ring-in the New Year with the all-new, 2017 edition of the *American Financial Directory*®. Previously known as the *Wisconsin Financial Institutions Directory*™, this indispensable resource provides up-to-date information on Wisconsin financial institutions that you can use for networking, market research, and more.

With its streamlined format, this helpful information source features a comprehensive collection of data, without the distraction of advertisements

and non-institution information. In addition to a listing of every depository institution and branch in Wisconsin, institution-specific data provided throughout the nearly 300 pages includes:

- Charter, institution type
- Institution name changes
- Principal correspondents
- Key officer contacts
- Board of Directors
- Fed telegraph name
- Funds processing/transfer information
- Location and number of branches
- Year established
- Financial information
- Association membership
- Holding company name and city
- Street, mailing address
- Head office banking hours, and much more

### Place your pre-order now to ensure January delivery!

For complete product and pricing details, including Wisconsin Bankers Association (WBA) special member pricing, contact the [FIPCO Customer Service Department](#) at (800) 722-3498 or visit the [FIPCO website](#). Limited quantities are available, so be sure to order today!

## FastApp Online Connects Seamlessly to Your Institution's Website

As leaders in the financial industry for nearly three decades, we understand that keeping your customers happy is paramount to the success of your organization. If your institution offers consumer and mortgage loan products, but doesn't necessarily have a high volume of mortgage business, finding the right prequalification tool can be difficult. That's why we developed **FastApp Online**, a new online data gathering tool that benefits you *and* your customers.

FastApp Online seamlessly gathers the customer data you're looking for, without the hassle of cumbersome and complicated processes that similar solutions often require. Customized with the colors, graphics and logos to coordinate with the look and feel of your organization, the system seamlessly connects from your institution's webpage to FastApp Online. Feeling as though they've never left the security and familiarity of your institution's site, your customers will easily input the required data. Once submitted, you're ready to use that information to cultivate the relationship as you work through the loan process together.

We're excited to offer you this innovative tool, and are pleased to announce that the interface between FastApp Online and *Compliance Concierge*™ is scheduled for release this quarter. In addition, our Deposit users can look forward to the FastApp Online deposit account tool first quarter, 2017. [Contact us today](#) at (800) 722-3498 to get started!

### Take a Closer Look at FastApp Online



To schedule a free 15-minute introduction to FastApp Online, contact [Art Weber](#) or [Sally Michaels](#) at (800) 722-3498, ext. 258.

## We Are Headed to Your Area – Let's Meet

The FIPCO Professional Staff is continuing to travel throughout the region and we'd love to see you in person. Attending any of the events shown below? Be sure to stop by and say hi! If you see that we'll be in your area and would like to schedule a personal consultation, please feel free to [contact us](#) at (800) 722-3498.

- » January 5 – [2017 WBA Economic Forecast Luncheon](#)  
Alliant Energy Center, Madison, WI
- » February 6-8 – [WBA Bank Execs Conference](#)  
The Pfister, Hotel, Milwaukee, WI
- » April 5-6 – [WBA Ag Bankers Conference](#)  
Chula Vista, Wisconsin Dells, WI

## A Strong Foundation for Success

### WBA Forms and FIPCO's Compliance Concierge™

Foundations must be strong, and today's financial institution executives and technology officers need to know that the software tools they provide to their staff offer a solid foundation for compliance. Originating in an era well-before computer processing, Wisconsin Bankers Association (WBA) forms have provided that solid foundation for Wisconsin institutions, with FIPCO updating and distributing the forms for nearly 30 years. These long-tested and trusted forms are available *exclusively* through FIPCO's *Compliance Concierge™* modular loan origination and deposit account opening suite.

"I recently completed a nested entity loan and the information provided in your *Compliance Concierge™* release notes was excellent! The instructions were very clear, concise and it was great to have the examples for reference. I was thrilled that everything worked exactly as it should, and it was easy to accomplish what I needed. Very well done!"

— Annie Zellmer  
Bank of Deerfield

Not only do WBA forms give more attention to Wisconsin-specific laws than the form sets used by national vendors, the association supports the forms in cases brought by or against users of the forms by filing amicus briefs. In addition, the WBA legal staff and Boardman & Clark LLP consulting attorneys are intimately familiar with the forms and the legal aspects relating to them, so they are able to address questions quickly and knowledgeably. The attorneys drafting the forms also use them with their own clients, so they ensure that the forms address issues reflected in actual transactions.

WBA forms, along with *Compliance Concierge™*, come with the unmatched customer support FIPCO is known for. This connection between FIPCO software support staff and the WBA Legal Department's compliance expertise make FIPCO uniquely positioned to provide this invaluable customer support. For more information, please contact the [FIPCO Customer Service Department](#).



Are you new to *Compliance Concierge™* Parameters (administration)? Does your system administrator need a Parameters refresher? If you answered "yes" let's get started and schedule a customized training session with FIPCO's Training Coordinator, Alice Hamilton. [Contact us](#) today at (800) 722-3498 ext. 233.

## Looking for a New Way to Deliver Loans, Deposits or Mortgages?

Join us for an enlightening and engaging webinar as we demonstrate the powerful resources available in our *Compliance Concierge™* software suite. The free 45-minute presentation will show you how the software can improve lender efficiency, maximize compliance, and enhance your customers' experience. State-specific presentations are scheduled for:

» Dec. 1 – **Wisconsin** | Dec. 13 – **Iowa** | Dec. 15 – **Minnesota**

Split into three sessions, the webinars will cover the loan, mortgage and deposit suites separately:

» **Loan:** 10-10:45am | **Mortgage:** Noon-12:45pm |  
**Deposit:** 2-2:45pm

[Register today](#) for the date of your choice, or contact the [FIPCO Customer Service Department](#) at (800) 722-3498 for more information.

## Maximize Your Technology Investment with Proper Education

Even the best tools remain ineffective if you don't know how to properly use them. Your software solutions are no different. Leverage your institution's technology investment to the fullest extent with proper education from the [FIPCO Education and Training Department](#). Upcoming events include the following:

(All events are *Compliance Concierge™* training courses.)  
Dec. 5-8, 8:30am – 4pm: 4-day Loan/Mortgage Training  
Dec. 8, 9am – 11am: \*\*Advanced Commercial and Agricultural Loans  
Dec. 12, 9am – 11am: \*\*Real Estate Construction and Second Homes Processing Ag Webinar  
Dec. 13, 9am – 11am: Commercial Webinar  
Dec. 13, 1:30pm – 3:30pm: \*\*Advanced Commercial and Agricultural Loans Real Estate Webinar  
Dec. 15, 1pm – 3pm: Basic Consumer Webinar  
Dec. 20, 8:30am – Noon: Deposits Webinar  
Dec. 21, 9am – 11am: \*\*Real Estate Construction and Second Homes Processing  
Dec. 21, 1pm – 4pm: \*\*Offered this month only!  
Dec. 22, 1:30pm – 3:30pm: \*\*Offered this month only!

To learn how you can benefit from FIPCO software training, visit the [FIPCO website](#), or contact the [FIPCO Training Department](#) today at (800) 722-3498.