

DON CLARKE SEMINARS

COLLATERAL ANALYST - OPERATIONS PERSONNEL SEMINAR COURSE OUTLINE



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COLLATERAL ANALYSTS – OPERATIONS PERSONNEL SEMINAR

Length: 2 day Seminar

- *Day 1: 9:00am – 4:00pm | Day 2: 9:00am – 12:00pm*

Seminar Schedule:

- Class Begins: 9:00am | Class Ends: 4:00pm
- Day 1 Breaks: (15 min) - 10:30am & 2:30pm | Lunch: (1 hr.) -12:00pm
- Day 2 Break: (15 min) - 10:30am

Course Overview:

A review of the role of the Operations/Collateral Analyst as it pertains to risk quantification and minimization.

Course Objective:

Students will learn how to glean pertinent information from borrower submitted documentation in a real-time basis, allowing them to detect and minimize emerging risk elevation.

COURSE OUTLINE:

1) Introduction

a. Importance Of The Operations Area

i. Tips Of The Spear

ii. Quantitative & Qualitative Analyses of Pledged Collateral

2) Daily/Monthly Functions Of The Operations Department

a. Reviewing Agings

i. Vertical & Horizontal Analyses

ii. Trends & Trajectories

- 5) Set Up And Maintenance Of Statistical Data
- 6) Interfacing With Support Groups
- 7) Case Work