

*From the President:*

## FIPCO Loan + Mortgage Software Forum Now a Virtual Event



Pamela Kelly

I'm excited to personally invite you to the upcoming **FIPCO Compliance Concierge & Software Forum – Loan + Mortgage**, held virtually Nov. 16-19. Your comfort and safety are our top priorities. We know that not everyone is able to travel or are comfortable traveling, so we are offering this forum as a live-stream event.

The biggest change with moving the Forum virtual is that there is just **one connection fee for the entire institution** and you can then register an unlimited number of staff to participate in the Forum. This allows more staff to take advantage of this great professional growth opportunity while keeping training costs low.

The Forum is suited for FIPCO software users of all levels, as well as compliance staff. With the virtual format, staff will be able to pick and choose the sessions that reflect their duties without having to leave the office. We're all busy,

I know it can be hard to carve out a specific time to attend a conference. All the speaker sessions, materials, and other conference content will be available, on demand, for a few weeks after the conference ends. So, even if some staff can't attend the live conference, they can still benefit from the event through hours of learning sessions that will be available, included in the connection fee.

It's no secret that the pandemic has changed many things, but what hasn't changed is how important it is to FIPCO that we continue to provide the highest-quality service and support to you. I hope to see you at the Forum. [Click here](#) for more information.

Pam Kelly is President of FIPCO® and can be reached at [pkelly@fipco.com](mailto:pkelly@fipco.com).

» **Get More Info at...**  
 » [www.fipco.com/fipco\\_training\\_events/forum-2020](http://www.fipco.com/fipco_training_events/forum-2020).

## Harness the Benefits of Data Integration, and Do More



The last few months of the year are the perfect time for trimming-down, lightening-up, and making improvements in your personal and professional life. One way to streamline your work and reduce the need for repetitive tasks is with data integration. Using FIPCO's *Compliance Concierge™* software interfaces, data integration enables the flow of information between two or more systems, helping you do more, while using fewer resources. By eliminating the need for duplicate data entry, interfaces can help you become more efficient, save time, increase productivity, and reduce the potential for data and compliance errors.

Easily transmit data from *Compliance Concierge™* Loan or Deposit and book it to your core/accounting platform. Be sure to visit the [FIPCO website](#) to see all the available options for your institution, including FIPCO's eSignature powered by DocuSign, and the following:

Core Accounting Systems: Fiserv Premier | Fiserv Graphical (Precision) | Jack Henry Silverlake, 20/20, and Core Director | ASI (Automated Systems, Inc).

If your core system is not listed, give us a call and we'd be happy to initiate a project to provide a data exchange.

*Compliance Concierge™* integrates with a variety of automated systems, including on-line loan applications, CRA and HMDA reporting systems, credit bureaus, flood certifications, relationship management software, and other third-party software, by using optional non-host or third-party interfaces.

For more information, contact the FIPCO Sales Department today at [fipcosales@fipco.com](mailto:fipcosales@fipco.com) or 800-722-3498, ext. 254.

**Support Corner with Chris and Cathy**  
*Let us help – call us at 800-722-3498, option 4.*  
**PPP Modification Agreement**

**Q. How do I find the PPP Note Modification and Instructions in Compliance Concierge™?**

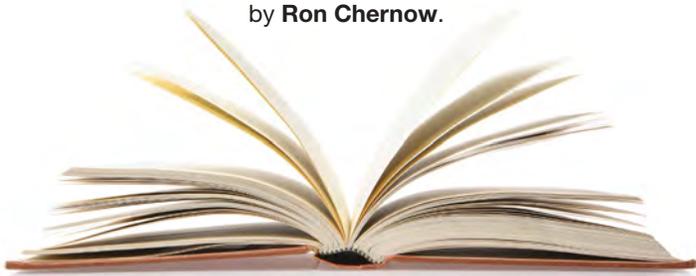
**A:** First some background on the form: The form was created to assist lenders with changes that need to be made to existing PPP loans in light of the passage of the Paycheck Protection Program Flexibility Act (PPPFA) effective June 5, 2020. The PPPFA changed the deferral of principal and interest payments from 6 months to a future date in time when the SBA remits to the Lender the amount of forgiveness of the Note under section 1106 of the CARES Act.

FIPCO released the form in the June 25, 2020 update. It will appear as Optional in the Quick App and Closing Print Lists when the Loan Type is Commercial – Closed End or Commercial Line of Credit – Closed End, and Unsecured is marked as collateral, and SBA PPP? checkbox is marked in the Loan Information screen. Instructions for the document can be found in the release notes.

Or you can go to <https://www.fipco.com/alert/remotework> and click on the links for the form and the instructions from the COVID-19 Products and Support page.

**A Novel Idea!**

This month's featured book is a recommendation from **Annette Witkowski**, Director – Training and Support. Annette is reading "Alexander Hamilton" by **Ron Chernow**.



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**Congratulations, Becky!**



Becky Schowalter

FIPCO is pleased to announce the promotion of **Becky Schowalter** to the position of software specialist. She will be responsible for development work related to *Compliance Concierge™* forms, state modules, databases, and more. Becky joined FIPCO in 2018 as administrative team assistant.

Becky can be reached at (800) 722-3498, ext. 222 or [bschowalter@fipco.com](mailto:bschowalter@fipco.com).

**FIPCO Deposit Compliance & Software Forum Held Virtually**



For the first time in FIPCO history, the annual **Compliance Concierge™ Deposit Forum** was held virtually on Sept. 17. FIPCO Staff would like to thank the many users

of *Compliance Concierge™* – Deposits who attended this year's forum. Focused on getting the most out of your deposit software, while navigating through ongoing compliance demands, the event delivered practical information and takeaways for participants to utilize right away.

Thank you to our sponsors and speakers from **Ascensus**, **MACHA/PAR**, and **Wisconsin Bankers Association**.

**Congratulations to the Prize Drawing Winners:**

- » Account Titling Handbook
  - **Emily**, Woodford State Bank
- » FIPCO Logowear Certificate
  - **Jodi**, Union State Bank West Salem
- » Certificate toward FIPCO Software Training
  - **Jan**, Mayville Savings Bank

If you missed the forum you can still access the written materials. The PDF file is available for \$75 and you can print it an unlimited number of times. If you are interested in receiving the PDF please [email](#) the FIPCO Training Department.