

Continuing Education

Professional partnering is an excellent way for Credit Unions to reach out to their communities. One opportunity is the relationship between a Credit Union and the local Certified Public Accountants (CPA's). CPA's can be an excellent source of new members and new business. Their clients may be dissatisfied with their current bank, may be in the process of looking for a new home, or may be seeking financing for a small business. A Credit Union can be part of the solution for that CPA's client. As part of J.R. Bruno and Associates commitment to helping Credit Unions better serve their communities, they have began to offering a new way to foster these relationships.

One of the best ways to build relationships is through Continuing Education classes. CPA's, like many other professions, need a number of Annual Continuing Education credits to keep their licensing current. Credit Unions can host a 2 hour class and breakfast (or lunch), covering SBA Lending, for example. In California and Arizona (and other states, if requested), J.R. Bruno & Associates teaches the class, provides all required materials, completes the necessary paperwork and can help market the classes. The Credit Union provides the location, and in return improves contacts within the community, and can educate CPA's about their products and SBA Lending. CPA's in turn, learn about Small Business Lending, the Credit Union's member benefits and complete the required education.

This approach has been extremely successful for other commercial lenders. First Commerce, for example, has closed a loan from a new contact every time they have held a Continuing Education class, and has forged numerous new relationships. Class sizes usually range between six to thirty people, and can also be taught to other professions such as attorneys.

In short, J.R. Bruno & Associates aids Credit Unions in serving the community by helping them reach out, and develop both partners and friends.

Byline & Bio:

Joanna Bruno is the Founder and President of J.R. Bruno & Associates. She has over 30 years experience in commercial lending and leads the team of Guaranteed Action Professionals (G.A.P.) in assisting SBA lenders with maximizing the effectiveness of their Small Business Administration (SBA) loan divisions. As a recognized expert in the field, she is in high demand for speaking engagements and training programs.

Since 1994, J.R. Bruno & Associates and the G.A.P. Team have served more than 120 lenders nationwide, making small business lending easy, affordable, and profitable for lenders. They are the leading consulting firm offering Technical, Training, Marketing, Member Business Loans (MBL), and SBA lending expertise. J.R. Bruno & Associates is also recognized nationally by the U.S. Small Business Administration and is an SBA Pre-Qualification Intermediary.

J.R. Bruno & Associates can be reached on the web at www.jrbrunoassoc.com, and at

J.R. Bruno & Associates
2152 E. Cumberland Rd
Glendora, CA, 91741
626-963-1267 (phone)
626-914-4496 (fax)