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# Bank Office Administration and Credit Committee Support Training Course

30 August – 3 September 2027
London

# Bank Office Administration and Credit Committee Support Training Course

**Ref:** 2369_88888 **Date:** 30 August – 3 September 2027 **Location:** London **Fees:** 5800 GBP

Bank Office Administration and Credit Committee Support is a 1-week training course for administrators, secretaries and executive assistants in retail, corporate and investment banks, built around a bank office administration toolkit. Banks now run more committees, handle more sensitive client files and face closer audit of their paperwork, so the support desk shapes how quickly and safely decisions are made. Jupiter Prime Training delivers this course on bank office administration and credit committee support.

## Why Bank Office Administration and Credit Committee Support Matters Now

Three forces shape bank office support today. Credit, risk and board committees meet more often and expect complete papers on time, with every approval condition traceable in the minutes. Client confidentiality and data protection expectations have tightened, so a misdirected email can become a reportable incident. Auditors also sample committee packs and retention records as evidence of control. An office that supports these routines well speeds lending decisions and passes audits quietly; one that handles them badly delays approvals, loses records and exposes the bank to client complaints.

## Who Gains Most from Bank Office Administration and Credit Committee Support

- Executive assistants who manage diaries, travel and correspondence for bank directors
- Committee secretaries who compile credit papers, record decisions and track action points
- Branch and department administrators who handle client files, mail and filing rooms
- Office coordinators who control access to confidential documents and shared drives
- Records clerks who apply retention schedules, archive files and arrange secure destruction

Banks gain most when the support staff of one credit or board committee attend together.

## Bank Office Administration and Credit Committee Support Capabilities

Participants leave able to run the paper trail that sits behind every bank approval.

- Build an executive diary protocol protecting committee dates — senior bankers
- Design a credit committee calendar with paper submission cut-offs — credit approval chair
- Apply document classification and clean-desk rules to client files — information security officer
- Write decision-focused minutes that record approvals, conditions and dissent — committee members
- Draft client and counterparty letters in a consistent bank tone — relationship managers

- Specify a records retention and archive schedule for office files — internal auditors

## Key Bank Office Administration and Credit Committee Support Terms

- Credit committee pack — the bundle of credit papers, financial summaries and recommendations circulated to members before an approval meeting.
- Action log — a running list of tasks agreed at a meeting, each with an owner and due date.
- Document classification — labelling files as public, internal, confidential or restricted to decide who may see and send them.
- Clean-desk rule — an office rule that no confidential paper or unlocked screen is left unattended.
- Retention schedule — a table stating how long each type of record is kept and when it is archived or destroyed.
- Delegated authority — the approval limits given to individuals or committees.

## Bank Office Administration and Credit Committee Support Day by Day

### Day 1: The Bank Office and Its Decision Rhythm

- Bank Committee Structure Map — Where Credit, Risk and Board Papers Flow
- Delegated Authority Matrix — Routing Requests to the Right Approver
- Executive Diary Protocol — Protecting Committee Dates and Client Meetings
- Priority Triage for Incoming Requests — Deciding What Reaches the Executive
- Travel and Visitor Arrangements Checklist — Planning Client and Branch Visits

### Day 2: Confidential Documents and Client Files

- Document Classification Labels — Deciding Who May See Each Client File
- Clean-Desk and Secure Print Routine — Preventing Exposure of Client Data
- Shared Drive Folder and Access Rights — Controlling Confidential Folders
- Misdirected Email Response Steps — Containing Data Incidents Quickly
- Courier and Mail Room Log — Tracking Original Documents and Securities

### Day 3: Credit and Board Committee Support

- Credit Committee Calendar and Cut-Offs — Getting Complete Papers on Time
- Committee Pack Assembly Checklist — Index, Version Control and Circulation
- Quorum and Conflict Declarations Register — Recording Valid Decisions
- Decision-Focused Minute Writing — Approvals, Conditions and Recorded Dissent
- Action Log Follow-Up — Closing Conditions Before Facility Drawdown

### Day 4: Correspondence and Records Retention

- Client Letter Templates — Consistent Tone for Approvals and Declines
- Executive Briefing Note Format — One-Page Summaries for Busy Directors
- Complaint Acknowledgement Letters — Timely, Neutral Replies to Clients
- Records Retention Schedule — Keeping, Archiving or Destroying Office Files
- Audit Evidence Folder — Preparing Office Records for Internal Review

## Day 5: Practising the Bank Office Administration Toolkit

- Corporate Lending Committee Simulation — Pack, Meeting and Minutes
- Insurance Partner Meeting Simulation — Diary, Briefing Note and Follow-Up Letter
- Confidential File Incident Drill — Applying Classification and Response Steps
- Peer Review of Minutes and Action Logs — Testing Accuracy and Clarity
- Bank Office Administration Toolkit Completion — Templates, Schedules and Checklists

## Applying Bank Office Administration and Credit Committee Support After the Course

- Introduce the credit committee calendar with paper cut-offs for the next quarter and agree it with the committee chair.
- Run a clean-desk and shared drive access check across the office and log every folder that needs tighter rights.

## Bank Office Administration and Credit Committee Support Questions FAQ

### What is bank office administration and credit committee support and why does it matter now?

It is the set of office routines that keep bank executives, committees and client files organised and secure. More committees and stricter confidentiality now make these routines decide how quickly a bank approves credit.

### Which roles gain most from bank office administration and credit committee support?

Executive assistants, committee secretaries, branch administrators and records clerks gain most. Each touches the same papers, so shared templates cut errors.

### How does bank office administration and credit committee support differ from a general secretarial skills course?

It focuses on the banking context rather than general office etiquette. Participants work with credit committee packs, delegated authority and client confidentiality.

### What do you bring back from bank office administration and credit committee support?

You bring back a set of ready templates: a diary protocol, committee calendar, minute format and retention schedule to adapt to your office.

## Bank Office Administration and Credit Committee Support: The Way Forward

The bank office administration toolkit first informs how the next credit committee cycle is scheduled and papered. Executive assistants, committee secretaries and records clerks use it daily. After its first cycle, revisit how quickly approval conditions were closed, since that speed decides how soon clients can draw on agreed facilities.