Educational Services for the Financial Services Industry

Center for Financial Training

CENTER FOR FINANCIAL TRAINING℠

Catalog and Schedule of Banking Courses

Education and Training for Bank and Credit Union Professionals

IMPORTANT MESSAGE!

For the Most Current and Complete Schedule, please visit our website (www.CFTnow.org) and click on the Education & Training tab. Our website also features Easy Online Registration and a Live Chat Help Desk!

The **Center for Financial Training (CFT)** has been in the business of training and educating bank and credit union employees for over 100 years.

CFT does not charge a membership fee, registration fees, or assessment fees. The tuition and pricing you find in this catalog, and on our website, is not subject to any additional fees.

If you have any questions about today's Center for Financial Training, please call Marta Carey, President and CEO, at 860-357-6141 or send an e-mail to Marta@CFTeducation.org.

Center for Financial Training
10 Waterside Drive – Suite 300
Farmington, CT 06032

learn@CFTnow.org
www.CFTnow.org

UPCOMING EDUCATIONAL EVENTS

Bank Trainers Conference
St. Louis MO
October 9-11, 2024

The *Center for Financial Training* and *OnCourse Learning* are excited to host this exciting "Train-the-Trainer" event designed exclusively for bank and credit union training professionals. Nationally Recognized Keynote Speakers, Informative Breakout Sessions, a State-of-the-Art Tradeshow, and Unique Networking Events with the nation's top trainers will inspire and enlighten you!

BankWorld
Uncasville, CT
January 12, 2024

Every year, BankWorld draws a huge crowd, and this year will be no different. We are returning to Mohegan Sun, continuing to make this New England's most anticipated banking expo! Register today to be part of an action-packed day, complete with thought-provoking educational sessions, interactive panels, industry- leading exhibitors, networking opportunities and attendee raffle prizes!

Commercial Lending School
Live via Zoom
January 23, 30, February 6, 13, 2024

The Commercial Lending School delivers in-depth training in all facets of commercial lending, with an emphasis on financial analysis, cash flow versus profit, and loan structure. Cases emphasizing small and medium-sized companies are featured. The instruction will be led by a team of senior bankers consultants. Case studies are used extensively, and active participation by the students is essential. The work will require study, documentation, analysis and decision making, often in small teams that will interact intensively with the instructors, both during the day and in the evening.

Federal Compliance School
Fall 2024
2023 Available Now, On-Demand!

CFT's Annual Bank Compliance School gives you what you need to handle compliance in today's environment. You'll receive the most current information, interpretation, tools and techniques to maintain a well-documented compliance program that includes an institution-wide monitoring, audit and training program. You'll listen and talk with some of the best compliance consultants, managers, and experts in the industry.

THE TRAINER'S TOOL KIT

Create an Employee Development Plan

Banks and Credit Unions face the challenge each year of how to spend their training budget in a way that will not only benefit their employees, but the overall goals of the company. Managers are busy with day-to-day tasks and find it difficult to spend time directing their employees' development. Many times, employees take classes that don't have any relevance to their current or desired position. How can managers easily assist their employees in making choices that will not only benefit the employee, but the company as well? Simple, let CFT assist you in designing an Employee Development Plan (EDP). To request more info, please email Marta@CFTeducation.org.

Bring CFT Courses In-House

Virtually any course or seminar that CFT offers can be brought onsite (or delivered as a private online class) and taught to your employees at a time convenient time for your company. For certain courses, you may also purchase CFT curriculum and teach the course in-house with an internal instructor.

Hire Training Experts to Support Your Internal Training

CFT has teamed-up with Learning Dynamics to bring you the finest consultants and trainers in the Country. Our new, comprehensive, portfolio of training and consulting services is available to you in a variety of formats as shown below:

Popular Topics:

- Leadership Development
- HR and Compliance
- Sales and Service
- Business Skills
- Banking-Specific Training and Services
- Organization Development/Management Consulting

For more information on the specific programs and services available, please email Marta@CFTeducation.org!

CENTER FOR FINANCIAL TRAINING™

Take Time for Your Own Learning and Development

The Bank Trainers Conference and Expo is an annual educational event that brings together hundreds of training professionals, representing financial institutions from across the country and beyond. A wide variety of workshops cover everything from eLearning to becoming a better trainer. Un-Paralleled Networking Opportunities with the greatest minds in Learning and Development await you at every turn. An industry- focused and intimate tradeshow will give you the freedom to discuss the latest training solutions and innovations with some of the most respected companies in the training world.

BANK TRAINERS
CONFERENCE & EXPO
THE SUMMIT FOR BANK & CREDIT UNION TRAINERS

Our 3-day annual educational event brings together hundreds of training professionals, representing financial institutions from across the country and beyond.

When: October 9-11, 2024
Place: St. Louis, MO

More Information!

All of this, and so much more, can be experienced Fall 2024 in St. Louis, MO. Be sure not to miss this once-a-year event!

BANK AND CREDIT UNION ATTENDEES

*Registration Fee covers all Workshops and Keynote Speakers, admission to the Trade Show, Refreshment Breaks and Lunches, and the Opening Reception.

Cancel on or before July 31, 2024 – Receive a Full Refund.

Cancel between August 1, 2024 and August 30, 2024 – Enjoy the Conference via Live Streaming Video with OnDemand Playback –OR– Receive Full Credit Towards the 2025 Conference.

Cancel after August 30, 2024 – Enjoy the Conference via Live Streaming Video with OnDemand Playback.

GETTING STARTED AND STAYING ON COURSE

Are you ready to learn more about banking, but not sure where to begin?
Getting started with your CFT education is as easy as registering for your first course. There are no registration fees or application fees and CFT tuition is usually employer paid (please confirm your company's tuition policy with your manager or supervisor). If your goal is to earn a CFT diploma or certificate, you may want to begin your studies with the Principles of Banking course. This course is a requirement of each one and will give you a complete overview of the fundamentals of banking.

Once you have registered for your first course and selected the diploma or certificate you wish to complete (not mandatory, but highly recommended), we will monitor your progress and keep you informed of your status along the way. Your official diploma or certificate will be issued to you when you have completed the required courses and electives. It's that easy!

Why CFT is Your Best Choice for Professional Training:
• CFT specializes in education and training solutions for banks and credit unions, featuring the popular course Principles of Banking
• CFT delivers education and training in today's relevant topics, including accounting and finance; credit and lending; management and supervision; communication skills; retail banking and teller operations; sales and service; operations and technology
• CFT offers results-oriented training with immediate on-the-job relevance
• CFT is the banking industry's leader in value and effectiveness
• CFT provides networking opportunities with leaders throughout the banking industry
• CFT programs enhance internal education programs already in place
• CFT delivers a comprehensive curriculum of more than 100 programs
• CFT diplomas and certificates, college credit, and certification credit may be earned by students
• CFT instructors are "subject matter experts" with a proven track record

CFT offers flexible scheduling options to fit every student's needs:
• Professional development seminars and webinars
• Online and Self-study courses featuring college level curriculum
• Traditional classroom setting courses, as well as customized, on-site training

How your company benefits from "The CFT Advantage":
• Improved productivity and profitability
• Improved employee retention and morale
• Increase customer satisfaction and retention
• Informed employees stay on top of compliance issues, decreasing company liability

Different Formats to Fit Every Schedule!

INSTRUCTOR-LED ONLINE

GUIDED SELF-STUDY

SELF-PACED ONLINE

LIVE & ON-DEMAND WEBINARS

TRAINING ON-DEMAND

LIVE E-CLASSROOM TRAINING

SCHOOLS

LIVE IN-PERSON CLASSES

INSTRUCTOR LED ONLINE COURSES

How an Online Course Works: Utilizing a website classroom and e-mail, students will read an online lecture, chapters in their textbook, and complete online assignments each week. The weekly assignment can be completed when convenient for the student. There are no set times for which you need to login. Quizzes and exams are also administered electronically.

Click Course title for description, available dates, formats, Tuition, and Registration

Course Title	CFT Credits
Accounting	3
Analyzing Financial Statements	3
Business Communication	3
Business Math	3
Commercial Lending	3
Consumer Lending	3
Customer Service Excellence	2
Deposit Accounts & Services	2
Economics	3
Financial Accounting	3
Human Relations	3
Human Resource Management	3
IRA Overview	0.25
Law & Banking: Applications	3
Law & Banking: Principles	3
Leading Your People to Success	2
Management	3
Marketing	3
Money and Banking	3
Organizational Behavior	3
Principles of Banking	3
Real Estate Appraisal	3
Real Estate Finance	3
Real Estate Law	3
Residential Mortgage Lending	3
Selling Fundamentals	3
Statistics	3
Supervision	3
Teller Operations	2
The Future of Business	3

CENTER FOR FINANCIAL TRAINING™

GUIDED SELF-STUDY COURSES

How A Self-Study Course Works: Guided Self-Study Courses are student-friendly, college level courses that allow you to take control of your busy schedule. You will study on your own, however you will have a qualified instructor only a telephone call or e-mail away. Upon registering for a class, you will be emailed your syllabus outlining your course and login instructions to access your textbook and course assignments. You will have UP TO four months (certain classes allow less than four months) from the starting date to complete your class. An advisor at the CFT office will keep in touch with you to provide additional assistance to help keep you on schedule. Your exams will be proctored by an officer or manager at your financial institution. Upon satisfactory completion of your class, you will receive your grade and the appropriate credits for the class.

Click course title for description, tuition and registration.

Course Title	CFT Credits
50 One Minute-Tips for Ret. Employees	.25
50 One-Minute Tips for Trainers	.25
Accounting	3
Accounting Basics	3
Advertising	3
Agricultural Lending	3
Analyzing Financial Statements	3
Bank Management	3
Be Your Own Coach	.25
Becoming a Successful Supervisor	.25
Business Communication	3
Business Ethics	2
Business Etiquette and Professionalism	.25
Business Math	3
Call Center Management	.25
Call Center Success	.25
Commercial Lending	3
Communication Skills for Business	2
Consumer Lending	3
Customer Service Excellence	2
Customer Service Innovation	2
e-Commerce	3
Economics	3
Effective Business Writing	2
Employee Training and Development	3
Employment & Labor Law	3
Financial Markets and Institutions	3
Financial Planning	3
Fraud Examination	3
Human Relations	3
Human Resource Development	3
Human Resource Management	3
Human Resource Selection	3
International Financial Management	3
Interviewing and Hiring Techniques	.25

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Course Title	CFT Credits
Law and Banking: Applications	3
Law and Banking: Principles	3
Leading Your People to Success	2
Management	3
Managing Change	2
Managing Performance & Productivity	2
Marketing	3
Money and Banking	3
Motivating Your Staff	.25
Organizational Behavior	3
Principles of Banking	3
Project Management	2
Project Management: Product Dev.	3
Project Management: Managerial Pro.	3
Real Estate Appraisal	3
Real Estate Finance	3
Real Estate Law	3
Residential Mortgage Lending	3
Sales Excellence	2
Selling Fundamentals	3
Statistics	3
Stress Management	.25
Supervision	3
Teller Operations	2
The Future of Business	3
The Excellent Call Center Rep.	.25
Wills, Trusts, and Estate Administration	3

Hot Topic Webinars!

Fulfill your bank training needs with Webinars

We offer over 450+ live and OnDemand webinars per year for bankers covering topics such as compliance, employee development, coaching, BSA/AML, lending, bank call reporting, TRID, as well as trending hot topics like pandemic preparedness, the Cares Act, regulation updates and much more! Delivered by respected financial services industry experts, our webinars are timely, relevant and always engaging. Webinars are offered both Live and OnDemand. For a complete list and pricing, use links below.

For Upcoming Webinars: Click here!

For OnDemand Webinars: Click here!

SELF-PACED ONLINE COURSES

How A Self-Paced Online Course Works: Our Self-Paced online courses run between 3-40 hours to complete depending on the course, bundle, or series you are enrolling in. 3-hour courses have a 90-day access time, 10-hour courses have 180-day access time and 25–40-hour courses have 360 days access time. Each course has online modules to complete to test your knowledge which are fun, interactive, and relevant! Whether you are looking to expand your skill set, earn professional credits, or learn something new, our online professional development courses and certificates pair perfectly with a busy schedule. Courses are self-paced and online, accessible from anywhere and available on mobile. We currently offer over **200** titles with prices ranging from **$15.00-$915.00**, we have something for everyone! **Use this Link to the website for the complete alphabetical list, detailed course information and to Register.**

Below are just a few popular titles:

Course Title	Tuition
Assessing Diversity and Inclusion	$89
Building HR for Growth Bundle	$299
Certificate HRCI HR Ethics	$259
Certificate HR Skills Best Practices	$350
Certificate in Leadership for Women in Business	$599
Certificate in Management Skills	$699
Communicating with Flair	$79
Excel Basics	$79
Excel Advanced Skills	$79
Diversity and Inclusion in the Workplace	$39
Handling Difficult Employee Behavior	$199
How Can I Help You? Customer Service Best Practices	$49
Effective Emails, Memo's, and Letters	$79
Hiring, Managing, and Developing Talent	$79
HR Hot Topic Bundle	$259
HR Skills-Conflict Resolution	$50
Managing in a Modern Organization	$79
Mastering Grammar Basics	$149
Networking	$79
Security Awareness Training	$15
Time Management	$79
The Modern Office	$79
The Hybrid Workplace	$79
The Effective Manager's Toolbox	$299
Todays' Contemporary Manger Certificate	$915
Writing Better Emails	$39
Working Remotely	$79

Self-Paced Online courses are added frequently. For most up to date schedule, Click here!

CENTER FOR FINANCIAL TRAINING™

CAREER-FOCUSED DIPLOMAS AND CERTIFICATES

The Center for Financial Training currently offers over 30 nationally-recognized diplomas and certificates, with concentrations in key areas of the financial services industry. These career learning tracks are designed for employees of banks, credit unions, and other financial service companies. For more information, including the course requirements for each of these diplomas and certificates, please visit our website at www.cftnow.org or contact learn@CFTeducation.org.

Introduction to Financial Services Certificate
General Financial Services Diploma
Advanced Financial Services Diploma
Introduction to Accounting Certificate
Introduction to Financial Services Operations Certificate
Financial Services Operations Diploma
Introduction to Credit Analysis Certificate
Introduction to Lending Certificate
Real Estate Lending Diploma
Consumer Lending Diploma
Commercial Lending Diploma
Introduction to Human Resources Certificate
Human Resources Diploma
Introduction to Supervision Certificate
Financial Services Management Diploma
Project Management Diploma
Professional Teller Certificate
Universal Banker Certificate
Universal Banker Diploma
Introduction to Financial Services Marketing Certificate
Financial Services Marketing Diploma
Introduction to Sales and Service Certificate
Sales and Service Management Diploma

For a complete updated list, click here!

Diploma Requirements and Eligibility:
•All required and elective courses must be completed with a passing grade (D or better) and the student's overall grade point average (GPA) must be 2.00 or higher.
•All courses must carry a minimum of 2.00 credits unless otherwise noted in the specific diploma and certificate requirements. •You can transfer up to half of the course credits needed for each diploma or certificate from a college, university, or other educational organization. CFT will also consider awarding credit for other training programs (including internal training) on a case- by-case basis.
•You can complete the requirements of your diploma and certificate at a pace that suits your schedule, and the courses can be completed in any order you choose.
•To keep pace with the ever-changing financial services landscape, it becomes necessary to revise the requirements of certain diplomas and certificates from time to time. However, once you have begun the process of completing the requirements for a specific CFT diploma or certificate, you can continue to do so right through to completion, under the requirement guidelines you started with.

CENTER FOR FINANCIAL TRAINING

STUDENT POLICIES

Code of Ethics and Conduct

The Center for Financial Training recognizes that it takes more than quality education and a commitment to the financial services industry to be successful in accomplishing our mission. We rely heavily on our solid reputation for honesty, fairness, and ethical conduct to attract our students, recruit quality instructors, and retain the high level of customer retention and respect that we have worked so hard to achieve. Our reputation ultimately rests on the good judgment and personal integrity of everyone - staff, volunteers, students, instructors, and all other individuals and organizations - involved with CFT.

Academic Integrity

CFT strongly supports the concept of academic integrity and seeks to foster sound moral behavior in its students and faculty. Academic dishonesty can take many forms, including cheating on examinations, plagiarism, helping others to commit dishonest acts, etc., and must never be tolerated. Students engaging in academic dishonesty are subject to serious consequences. Instructors who observe or suspect an incident of academic dishonesty shall bring it to the attention of an appropriate office official immediately, for prompt investigation, review, and action.

CFT Grading System

The Center for Financial Training uses an official letter grading system for courses eligible for awarding credit. Letter grades are awarded as follows:

A = (90-100) Superior
B = (80-89) Excellent
C = (70-79) Satisfactory
D = (60-69) Lowest Passing
F = (< 60) Failing
I = Incomplete (If the work is not completed within one month of the conclusion of the course, the "I" automatically becomes an "F".)
P = Passing (This grade is used for programs of less than two credits, for which the letter grading system is inappropriate.)
T = College Credit (This grade is recorded for transfer credit from accredited colleges and universities.)
W = Withdrawal (An "F" will be recorded by the CFT office if the student has not withdrawn in writing.)

Non-Discrimination Clause

The Center for Financial Training does not discriminate in its educational and employment policies on the basis of race, color, creed, religion, national/ethnic origin, sex, sexual orientation, gender identity and expression, genetic information, age, disability, or service in the military or other uniformed services.

STUDENT ACADEMIC RECORDS

The Center for Financial Training follows a strict confidentiality policy regarding CFT student records. All requests for CFT student records must be in writing from the student. The one exception to this requirement is for the appropriate representative at the student's financial institution to receive the student's grade upon the completion of classes, and periodically receive transcript information on employees for personnel files. Students sign an authorization to release this information to their employer when they register for a CFT course. Following are the types of recordkeeping services available from the Center for Financial Training:

Student Transcripts

The Center for Financial Training maintains all student records on a permanent file at the CFT office. Students who wish to obtain a copy of their CFT student records should complete the Center for Financial Training Recordkeeping Services Request Form. Most colleges and universities require an official transcript when students request a transfer of CFT credit. An official transcript costs $30.00 and includes an unofficial copy to the student. The official transcript fee, along with the Recordkeeping Services Request Form, can be emailed to the CFT office. You can use the online bill pay to pay the fee as this is the quickest way to process Online Bill Pay.

Transfer Credit Evaluation

CFT accepts transfer college credits from most colleges and universities and can award credit for a variety of other training programs students have taken outside of CFT. To receive transfer credit into a CFT student's record, students will need to complete the Center for Financial Training Recordkeeping Services Request Form and forward it to the Center for Financial Training office, along with the $20.00 transfer credit evaluation fee. Please instruct your college to send your official transcript directly to the CFT office. Upon completion of the transfer credit evaluation by the Center for Financial Training, students will receive a CFT transcript reflecting which college credits were accepted into their CFT student record.

Diploma and Certificate Eligibility

Diplomas and Certificates are issued to eligible students. To confirm and request a diploma or certificate at any other time, please complete the Student Recordkeeping Services request form.

Diploma or Certificate Replacement

The fee to replace a lost CFT diploma or certificate is $10.00. To request a replacement diploma or certificate please complete the Student Recordkeeping Services request form.

Student Request for Recordkeeping Services Form

You can obtain the Recordkeeping Services Request Form on our website located at www.cftnow.org.

COURSE WITHDRAWAL FEES AND POLICIES

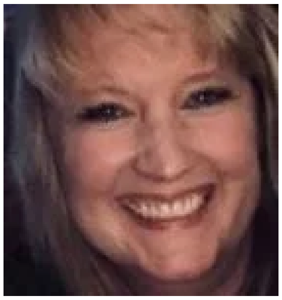
The Center for Financial Training requires all students who enroll in CFT courses to sign registration form which states that they have read and understand the CFT withdrawal policy. Students who must withdraw from a CFT course should submit a completed Course Withdrawal Form to the CFT office. Employers may seek reimbursement from students who incur withdrawal charges.

Instructor Facilitated Online Course Withdrawal Policy
A student who must withdraw from a CFT instructor-led on-line course must submit a completed Course Withdrawal Form. Students who withdraw 6 days or more before the start date of class are not subject to a withdrawal fee or tuition charge. Students who withdraw between 6 days before the class begins and 11 days from the start date will be responsible for a withdrawal fee of $125.00 plus book cost (if applicable) unless the book is returned in new condition within 7 days of the withdrawal. A student who withdraws after 10 days from the start date will be responsible for the full class tuition.

Guided Self-Study Course Withdrawal Policy
A student wishing to withdraw from a Guided Self-Study Course must submit a Course Withdrawal Form within seven days of the course start date to receive a refund, less a $140.00 per course withdrawal fee. The student is also responsible for the book cost unless the book is returned in new condition within seven days of the withdrawal. There will be no refunds given after the seven-day period. All students who withdraw after the initial seven-day period will be responsible for the full tuition amount and must submit a completed Course Withdrawal Form to receive a course grade of “W” rather than an “F”.
A one-time extension of 60 days may be granted to Guided Self-Study students on an individual basis. All requests for extensions must be made in writing prior to the scheduled ending date of the program. A $140.00 extension fee will be due and payable by the student before an extension becomes official.

Seminar and Specialty School Withdrawal Policy
Cancellations received at least seven days prior to the scheduled program date will receive a full refund or a credit toward a future CFT seminar/school. Cancellations received less than seven days prior to the scheduled program date will not receive a refund or a credit. Substitutions may be made at any time. No-shows will be charged the full amount due.

Different Formats to Fit Every Schedule!



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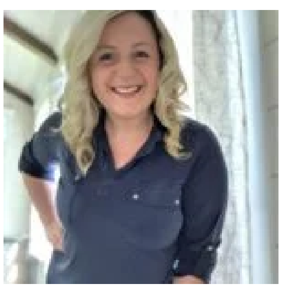

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