

NAME: \_\_\_\_\_ Month/Day of Birth: \_\_\_\_/\_\_\_\_

Organization: \_\_\_\_\_

Email address: \_\_\_\_\_ Tel# \_\_\_\_\_

Designed for branch employees seeking a true and rich universal banking model and suited as a career path beyond entry-level through assistant manager levels. Retail employees require a full range of skills and knowledge to manage relationships across a broad spectrum of modern topics. Next level after Certified Modern Banking Representative.

**REQUIRED COURSES:**

GRADE	DATE COMPLETED	COURSE	DELIVERY OPTIONS				
			L	W	SP	ILO	GL
		Principles of Banking	●	●		●	●
		Legal Foundations in Banking	●	●			●
		Deposit Accounts and Services	●	●			●
		Handling Workplace Conflict	●	●	●		●
		IRA Essentials OnDemand or equivalent internal IRA Basics course	●		●		
		Sales Essentials Certificate or equivalent internal sales course	●		●		●
		Security Awareness			●		
		Certification Exam			●		

L= Live    W=CFTEA Webcourse    SP= Self-paced Online    ILO = Instructor-Led Online    GL = Guided Learning

PLEASE CONTACT THE CFTEA OFFICE FOR CONFIRMATION OF COMPLETION WHEN APPROACHING COMPLETION OF A CERTIFICATE OR DIPLOMA