

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, including lending. Level 1 Required for completion.

REQUIRED COURSES:

GRADE	DATE COMPLETED	COURSE	DELIVERY OPTIONS				
			L	W	SP	ILO	GL
		Written Communication <u>or</u> Certificate in Business Communication	●	●			●
					●		
		Fundamentals of Consumer Lending <u>or</u> Consumer Credit Products	●	●			●
			●	●			●
		Fundamentals of Mortgage Lending	●	●			●
		Fundamentals of Small Business Banking	●	●			●
		Overview of Analyzing Financial Statements ~	●	●			●
		Introduction to Leadership			●		
		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