

NAME: _____ Month/Day of Birth: ____/____

Organization: _____

Email address: _____ Tel# _____

This curriculum introduces bank personnel to the role of loan servicing and the supporting functions it provides to customers and within an organization. The development of knowledge and practical skills in this area provides the foundation for an educational career path leading to the Loan Servicing Diploma and the General Banking Diploma and/or Bank Operations Diploma.

REQUIRED COURSES:

GRADE	DATE COMPLETED	COURSE	DELIVERY OPTIONS				
			L	W	SP	ILO	GL
		Principles of Banking <u>or</u> Banking Today <u>or</u> Banking Fundamentals <u>or</u> Banking Basics Suite	●	●		●	●
		Certificate in Business Communication <u>or</u> Written Communication	●	●			●
		Security Awareness			●		
		Business Telephone Skills	●	●			●
		Balancing Priorities	●	●	●		●
		Emotional Intelligence	●	●	●		●
		Handling Workplace Conflict	●	●	●		●
		Mortgage Servicing: Overview			●		
		Mortgage Servicing: Escrow Accounts			●		
		Mortgage Servicing: Error Resolution			●		
		Mortgage Servicing: Loan Origination and Servicing Transfers			●		
		Mortgage Servicing: Loss Mitigation			●		
		Mortgage Servicing: Payment Crediting and Periodic Statements			●		

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