

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

Organization: _____

Email address: _____ Tel# _____

This diploma requires a solid understanding of banking, accounting, credit analysis and compliance. The courses provide a solid foundation for learning the mortgage lending business, including aspects of underwriting, processing and services, and approaches to profiling mortgage prospects. This diploma is well suited to aspiring mortgage lenders.

REQUIRED COURSES:

| GRADE | DATE COMPLETED | COURSE | DELIVERY OPTIONS | | | | |
|-------|----------------|--|------------------|---|----|-----|----|
| | | | L | W | SP | ILO | GL |
| | | Accounting 3 Credit Financial or General | ● | ● | | ● | ● |
| | | Legal Foundations in Banking # | ● | ● | | | ● |
| | | Introduction to Analyzing Financial Statements ^ | | | ● | | |
| | | Money and Banking | ● | ● | | ● | ● |
| | | Residential Mortgage Lending | ● | ● | | ● | ● |
| | | Handling Mortgage Inquiries and Making Referrals | | | ● | | |
| | | Ethical Issues in the Workplace | ● | ● | ● | | ● |
| | | Personal Tax Return Analysis | ● | | ● | | |
| | | Balancing Priorities | ● | ● | ● | | ● |
| | | Principles of Banking or Banking Fundamentals | ● | ● | | ● | ● |
| | | Verbal Communications or (Certificate in Business Communication may be applied as requirement for Verbal or Written Communication) | ● | ● | | | |
| | | Written Communication or (Certificate in Business Communication may be applied as requirement for Verbal or Written Communication) | ● | ● | | | ● |

Law & Banking: Applications (retired) or Law & Banking: Principles (retired) may be applied in place of Legal Foundations in Banking.
^ Full Analyzing Financial Statements course will also cover this requirement.

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