

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

Organization: _____

Email address: _____ Tel# _____



Develop essential skills for providing full-service banking. Build broad product knowledge and an understanding of the different types of retail deposit and loan products. Gain insight into how to offer the appropriate credit, deposit, and other banking services to meet customer needs and expectations. Learn best practices for cultivating customer relationships.

By completing the ABA Personal Banker Certificate curriculum, you'll strengthen your ability to drive sales and service, as well as retain and grow customer relationships.

REQUIRED COURSES:

| GRADE | DATE COMPLETED | COURSE | DELIVERY OPTIONS | | | | |
|-------|----------------|---|------------------|---|----|-----|----|
| | | | L | W | SP | ILO | GL |
| | | Banking Basics Suite <i>or</i> Principles of Banking <i>or</i> Banking Fundamentals | | | • | | |
| | | | • | • | | • | • |
| | | | | | | • | |
| | | Communication Basics Suite | | | • | | |
| | | Effective Referrals Suite <i>or</i> Effective Referrals | | | • | | |
| | | Ethical Issues for Bankers <i>or</i> Ethics in the Workplace | | | • | | |
| | | | • | | • | | |
| | | Fundamentals of Consumer Lending Suite <i>or</i> Fundamentals of Consumer Lending | | | • | | |
| | | | • | | | | |
| | | Fundamentals of Small Business Banking Suite <i>or</i> Fundamentals of Small Business Banking | | | • | | |
| | | | • | | | | |
| | | Introduction to Analyzing Financial Statements | | | • | | |
| | | Making the Client Call <i>or</i> Needs Based Selling (replaced Cross-Selling Deposit Products) | | | • | | |
| | | | • | | | | |

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|--|--|--|---|---|---|---|---|
| | | Managing Time at Work <u>or</u> Managing Your Time | | | • | | |
| | | | • | | | | |
| | | Online Communication Suite | | | • | | |
| | | Overcoming Objections | | | • | | |
| | | Relationship Sales Suite <u>or</u> Introduction to Relationship Selling | | | • | | |
| | | | • | | | | |
| | | Sales Planning Suite <u>or</u> Introduction to Relationship Selling | | | • | | |
| | | | • | | | | |
| | | Understanding Bank Products <u>or</u> Deposit Accounts and Services | • | | • | | • |
| | | | • | | | • | • |
| | | Verbal Communication Suite <u>or</u> Effective Telephone Communication | | | • | | |
| | | | • | | | | |
| | | Written Communication Suite <u>or</u> Effective Written Communication <u>or</u> Written Communication <u>or</u> (Certificate in Business Communication may be applied as requirement for Verbal <u>or</u> Written Communication) | | | • | | |
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| | | | | | • | | |

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