

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

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

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



Develop the key skills for building trusted relationships with business customers. Discover tactics to better engage customers by understanding their needs and being able to offer appropriate solutions. Develop a broad knowledge of small business-specific products. Learn how to cultivate strong customer relationships. Master best practices for executing sales calls, handling objections, and delivering on-going service. Gain insight into ways to grow your book of business.

By completing the ABA Small Business Banker Certificate curriculum, you'll strengthen your knowledge of relationship-centric sales approaches.

### REQUIRED COURSES:

GRADE	DATE COMPLETED	COURSE	DELIVERY OPTIONS				
			L	W	SP	ILO	GL
		Calling on Small Business Customers			•		
		Credit Products for Small Businesses			•		
		Deposit Products and Services for Small Businesses			•		
		Fundamentals of Small Business Banking Suite			•		
		Introduction to Analyzing Financial Statements			•		
		Personal Tax Return Analysis	•		•		
		Relationship Selling to Small Business Customers			•		
		Retirement Products for Small Businesses			•		
		Sales Planning Suite			•		
		or Building and Retaining Customer Relationships	•				
		Servicing and Growing Small Business Relationships			•		
		Small Business Borrowing			•		

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