

CFTEA



Center for Financial Training and Education Alliance

Trusted



Flexible



Experienced



Innovative

cftea.org

Version: December 1, 2020

# Unlock Your Potential



CFTEA Spring 2020 Catalog



Develop Career Paths through Certificates, Diplomas and Nationally Recognized Certifications

It has been a year of transformation at CFTEA and we are excited to launch so many new educational career paths to compliment our updated and new courses this spring!

A key part of our mission and a top priority for me is to exceed expectations for our student experience. To assist, our education committee will be examining older materials that will be flagged for update or replacement. Our website continues to evolve and develop features that make it easier to navigate our large library.

Our goal is to have our twenty-one (and growing) educational career paths to assist students, instructors, department managers and organizations to provide a tool to sort through our many courses. Are we missing any career paths? Let us know so we can meet the need within that area.

We continue to work on a variety of projects designed to expand CFTEA's ability to live up to these goals. As we move into 2020, are you looking to gain or enhance career skills for advancement and opportunity? Let CFTEA help you reach your goals and succeed!



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## CFTEA: Investing In Your Success

### Mission

CFTEA is committed to offering professional continuing education programs in partnership with financial institutions and area organizations and their employees. We value and deliver a high standard of cost-effective education programs while promoting personal growth through professional development.

CFTEA Is a Local ABA  
Training Provider



A National  
CFT Member



### Connect With CFTEA

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


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York County, Maine Student Awards Banquet (Kennebunk Savings)

## Your Trusted Partner in Transforming Organizational Performance

The Center for Financial Training and Education Alliance (CFTEA) trains, guides and provides opportunities to individuals and teams to help organizations unlock business value by optimizing individual, team and organizational performance. With over 96 years in the learning and development field (as part of the original AIB chapters), CFTEA is a partner of choice for business growth, employee recognition and advancement. CFTEA has a reputation for providing high quality programs taught by experts with years of real-world experience. Our various programs, certificates and diplomas can be personalized to address unique client challenges, provide career pathing, reinforce culture and provide the greatest experience for students and organizations while delivering material locally or virtually.

### Why Choose CFTEA?

#### Flexible Solutions

Our vast selection of course offerings across various program areas can be tailored to create a learning solution that best meets your organization's unique needs. Our personalized approach to each interaction allows us to deliver the right solution every time.

#### Collaborative Approach

We provide relevant, actionable and practical solutions tailored to address the challenges specific to each client. Our partnership with organizational learning and development allow for the ability to address gaps to ensure we are targeting the right goals with measurable results

#### Trusted Partner

We have been training financial institutions and businesses for more than 25 years. CFTEA is a valued partner that is more than just another training vendor as most of our client relationships span decades.



## Certificate, Diploma and Certification Programs

The Center for Financial Training and Education Alliance (CFTEA) provides industry and nationally recognized certificates, diplomas and certifications to help professionals advance through the mastery of specific competencies. By covering foundational concepts with job focused tools and knowledge, employee effectiveness is enhanced. Students walk away equipped with specialized skills that build experience and confidence allowing for significant contributions to your career and organization.

Through our alliance with the American Banker's Association, Ascensus, Cengage, Hondros Learning, Logical Operations, MindEdge, New Horizons, OnCourse and Total Training Solutions, we bring together the best learning experiences and material to offer quality experiences. This unique approach allows organizations and professionals who are looking for an educational career path, certificate, diploma or certification program to receive national recognition that supports their development.

### The CFTEA Custom Experience

What is important to your organization? For many, especially those with limited training budgets, focusing in on the right type of learning and development that will empower and advance your team is critical. *All of our courses, certificates, diplomas and certifications can be customized and include aspects of your internal training to provide a truly unique experience, unlike any other.*

Choose from our library of existing courses or the material can be customized to fit your organizational needs and approach.



## Business Skills

Accounting   
Administrative Assistant   
Bank Financial Management  
Bank Solutions Provider  
Bank Teller  
Banking Customer Service Experience  
Branch Manager Bootcamp  
Business Communication  
Call Center / Customer Care   
Cash Management / Merchant Services   
*Certified Banker*  
*Certified Modern Banking Representative*  
*Certified Modern Branch Professional—Level 1*  
*Certified Modern Branch Professional—Level 2*  
Credit Union Member Service Experience  
Customer Service Representative  
Data Analytics  
Deposit Operations   
Digital Banking   
Digital Marketing  
Emergency Management   
Essential Professional Development  
Entrepreneurship  
Finance Essentials  
Foundational Bank Marketing  
Fraud Prevention  
General Banking  
Human Resource Management  
Non-Profit Management  
Organizational Behavior  
Personal Banker  
Small Business Management  
Small Business Banker  
Trust: Foundational  
Trust: Intermediate  
Trust: Advanced  
Universal Banker

## Course Prep and Exams

PMP Project Management Exam Prep Course  
Lean Six Sigma Green Belt Prep Course & Exam  
Six Sigma Green and Yellow Belt Prep Course & Exam

## Compliance

BSA and AML Compliance  
*CAMS Certification*  
Deposit Compliance  
Financial and Credit Risk Management   
Lending Compliance  
Operational Risk Management  
Risk management Frameworks 

## Leadership, Managerial & Supervisory

Advanced Professional Development for Supervisors  
*Certified Modern Manager*  
*Certified Modern Supervisor*  
Finance Essentials for Managers  
Introduction to Leadership  
Leadership Narrative  
Leadership for Women in Business  
Professional Development for Supervisors I  
Professional Development for Supervisors II  
Project Management for Teams  
Project Management Team Leadership  
Supervisor / Team Leader  
The Effective Manager's Toolbox

## Learning and Development

Online Learning  
*Modern Classroom Certified Trainer (MCCT)*

## Lending

Business & Commercial Lending  
*Certified Business Credit Analyst*  
*Certified Business Credit & Tax Returns Analyst*  
Commercial Real Estate Lending Decision Process  
Consumer Lending in partnership with eEnsign  
Loan Servicing   
Loan Processing   
Loan Underwriting   
Residential Mortgage Lender

## Professional Skills & Special Topics

Advanced Professional Development  
Agile Project Management  
*Certified Banker*

# Certificates & Certifications / Diplomas

## Professional Skills & Special Topics

*Certified Health Savings Professional (CHSP)*  
*Certified IRA Specialist I (CIS I)*  
*Certified IRA Specialist II (CIS II)*  
Creativity and Innovation  
Interpersonal Skills  
Professional Communication Skills  
Foundational Professional Development  
Essential Professional Development  
Sales Essentials  
Sales Manager

## Technology & Business Software

Cybersecurity  
Project Management for I.T.

## Business Skills

Accounting   
Administrative Assistant   
Advanced Financial Services  
Bank Marketing  
Bank Operations  
Call Center / Customer Care   
Cash Management / Merchant Services 

## Business Skills

Deposit Operations   
Digital Banking   
General Banking  
General Business   
Human Resources  
Marketing   
Universal Banker

## Lending Diplomas

Business Banking and Commercial Lending  
Consumer Lending  
Credit Analyst  
Introduction to Lending  
Loan Servicing   
Loan Processing   
Loan Underwriting   
Residential Mortgage Lending

## Leadership, Managerial & Supervisory

Supervision

Ollie says: "Are You Ready?"

**Celebrate Your Success at CFTEA 's Student Awards Banquet in June 2020!**

Check your course progress to meet the May 31 completion date to receive recognition for your hard-earned certificate, diploma or certification.



Check [cftea.org](http://cftea.org) for the latest details and Information on career development.



# Certifications

What's  
New?

## Why Certifications Are Important?

Certification programs go beyond training by providing a nationally recognized measurement of knowledge and skills. See our website [cfta.org](http://cfta.org) for detailed information on these nationally recognized certifications.

Certifications allow professionals to stay up to date, earn more money, provide professional growth and the ability to stay ahead of the pack in the professional world.

CFTEA meets the need for recognized certifications with the following offerings that are ideal for educational career paths within an organization.

- **Certified Modern Banking Representative (MBC 1)**

This certification is designed for entry level employees at financial institutions and shows the world you are serious about making a difference in your career. With so much information coming at a newer employee, the focused content equips students to take on modern banking challenges.

- **Certified Modern Branch Professional Level 1 (MBC 2) and Level 2 (MBC 3)**

This certification is designed for branch employees seeking a true universal banking model and is suited as a career path beyond entry level through assistant managers. Retail employees require a full range of skills and knowledge to manage across a broad spectrum of modern topics. The topics covered build branch strength and position employees for future growth within the organization.

- **Certified Banker**

Designed to provide new bankers with general knowledge of the banking industry, encourages the development of a strong professional image and ethics.

- **Modern Supervisor Certification (MMC 1)**

The *Today's Supervisor* program has been updated with new, relevant materials that speak to the needs of new supervisors in the current and future business world. The modules have been organized to better compliment and build on each section during this interactive program.

- **Modern Manager Certification (MMC 2)**

**The next step after Modern Supervisor Certification.** Based on manager feedback, today's business environment requires managing unique challenges and opportunities. According to *New Horizons*, 85% of organizations do not think their supply of managers are strong enough to fill vital roles. This certification has been designed to enhance current supervisors through highly engaging and cost-effective educations designed from educators of Harvard and M.I.T.



# Certifications

- **Certified Health Savings Professional (CHSP)**

HSA University creates an industry standard in HSA expertise with the accredited CHSP designation. Expand your HSA knowledge in a five-week blended learning format that is flexible to fit your busy schedule without leaving the office.

- **Certified IRA Specialist (CIS 1 and CIS II)**

A six-week course that provides attendees a solid foundation of IRA knowledge through a combination of interactive weekly webinars and eLearning modules. IRA University graduates emerge with confidence in their ability to handle common IRA transactions.

- **Certified Business Credit and Tax Return Analyst**

This program will give financial services individuals the skills necessary to distinguish between quality, poor and marginal credits. Students will have received training in analyzing the financial statements for various types and forms of businesses, and how to structure appropriate loan packages. Students will work with the balance sheets, profit and loss statements and cash flow statements of businesses and learn how to identify the ways in which cash is generated and used by businesses. A take home examination will measure the student's comprehension of the material covered and ability to effectively utilize it in the decision-making process.

## Customize your certifications with CFTEA

Does your organization need a change to a certification? Contact us and let us help you make certifications fully meaningful to your organization, employees and management.

Most programs modules can be adjusted to meet the goals, budgets as well as the unique needs of your culture. Ask us how we can help you succeed.

**More than just another training vendor!**



# Certification: Modern Banking Representative (MBC I)



## Overview:

Replacing Certified Teller—updated, less expensive and instant exam results. As a modern certification in today's business world, the Modern Banking Representative (MBC I) covers updated material that allows those new, entry-level employees to develop in their career and equips them to take on modern banking challenges with knowledge, confidence and skill.

## Instructor Materials:

Instructor materials have been developed for each course of this certification to provide instructors with key topics and points to emphasize to assist students with gaining accurate knowledge for this exam.

## Course Requirements:

**Banking Today (2019)** (Also available to be taught in-house) [Guided Learning C1011GL \$245]

This course provides participants with the fundamental information they need to understand the business of banking and how they, as an employee of a financial institution, fit into the overall business.

**Legal Foundation in Banking (2018)** (Also available to teach in-house) (Guided Learning A1080GL \$450, Instructor Led Online C1080ILO—\$695)

Learn the underlying legal structure for conducting the business of banking, the core language that must be understood as well as the key legal requirements affecting banking in today's world.

**Quality Service formerly Customer Service (2019)** (Also available to teach in-house) (Guided Learning C1045GL, Webcourse C1045WC \$245)

It's more than a friendly smile and being fast. When an organization puts the customer at its core, outstanding interactions are created. From the first interaction to a lifelong relationship, a connection is built by developing service skills that encourage customers to return.

**Fighting Fraud: Top 10 Scams Targeting Our Nations Seniors (2019)** **Free Course**

The United States Senate Aging Committee hotline has held hearings on seven out of the ten scams discussed in this course. This course focuses on scams in your state and is a resource to learn more about common scams targeting seniors and how to avoid them.

**Application, Exam and Status:** A certification application may be submitted with employer recommendation for \$100. Certification exam includes one free retake. Certification will last for 5 years and require an exam retake of \$25 or taking any CFTEA class within that timeframe to maintain certification. The exam will be a timed, online test.


Our webcourses combine the personal interaction of a live class with the convenience of attending a class anywhere with an internet and phone connection. At times, students want more interaction and support than is found within self-paced or guided learning programs. Assignments are prepared for class discussion and the instructor will provide interactive guidance for the material. Finish classes in fewer sessions earning the same credits as comparable in-person live classes that might not be available in your area.

Secure your spot today by signing up early for these flexible and relevant opportunities. Enjoy a sale for Accounting with \$100 off and daytime webcourses for \$150 live (normally \$265 elsewhere) or \$99 for the recorded version.


### January 2020

Course	Code	Date	Time	Duration	Cost
Residential Mortgage Lending	C6050WC	1/14/20	6:00pm-8:00pm	8 weeks	\$450
Accounting—SALE (\$100 off)	C1000WC	1/20/20	6:00pm-8:00pm	10 weeks	\$350
 40 Steps to Make Safe Deposit a Profit Center	C1443WC	1/29/20	10:00am—Noon	2 hours	\$150/\$99
Commercial Lending	A6350WC	1/30/20	6:00pm-8:00pm	8 weeks	\$450


### February 2020

 Top 50 Important Safe Deposit Box Operating Procedures	C1447WC	2/13/20	10:00am-Noon	2 hours	\$150/\$99
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### March 2020

Quality Service	C1045WC	3/4/20	6:00pm—8:00pm	8 weeks	\$245
 Top 25 Safe Deposit Compliance Issues	C1446WC	3/17/20	10:00am-Noon	2 hours	\$150/\$99
Written Communication	C1865WC	3/17/20	6:00pm-8:00pm	8 weeks	\$450

### April 2020

Consumer Lending	A7008WC	4/1/20	6:00pm—8:00pm	8 weeks	\$450
Legal Foundations in Banking	A1080WC	4/2/20	6:00pm—8:00pm	8 weeks	\$450
 30 Steps to Audit a Safe Deposit Area	C1441WC	4/22/20	10:00am-Noon	2 hours	\$150/\$99

# Ascensus IRA Training and Certified IRA Specialist

## Get a jumpstart on IRA season!



With more than 35 years of experience, Ascensus offers tailored solutions that meet the needs of asset managers, banks, credit unions, state governments, financial professionals, employers and individuals.

## [IRA Essentials OnDemand](#)

*IRA Essentials OnDemand* is the perfect solution for those who need an introduction to IRAs but cannot attend a face-to-face training session. IRA reference materials, job aids, quizzes and videos blend together to create an immersive educational experience. Explore six educational tracks: Introduction to IRAs, Establishing an IRA, Funding, Portability, IRA Distributions and Reporting.

## Who Should Attend

You should attend if you

- need to learn the basics of Traditional and Roth IRAs
- or
- want an updated, general refresher on IRA rules.

The best part? This convenient educational opportunity is available 24/7, on-demand, wherever you need it.

## Registration Fee

Registration is just \$249/user and includes unlimited access for 30 days to all educational tracks and course materials.

## [IRA University](#)

*IRA University* is a six-week course that provides attendees with a solid foundation of IRA knowledge through a combination of interactive weekly webinars and eLearning modules. IRA University graduates emerge with confidence in their ability to handle common IRA transactions.

After the "Getting Started" kickoff webinar, each week consists of a self-paced *eLearning* module (45 minutes - 1 hour) followed by a 90-minute interactive webinar (Wednesdays, 2:00 pm ET) to help participants apply their knowledge from the *eLearning* module. After completing *IRA University*, attendees have the opportunity to earn their Certified IRA Specialist I (CIS I) designation for no additional cost.

Attaining the CIS I designation will help fulfill your career and give your financial organization's IRA owners the peace of mind that comes from working with a professional IRA representative.

## Registration Fee

Your investment for the full six-week *IRA University* is \$1,199 and includes the CIS I exam— an added value of \$275

## [IRA University Session Dates](#)

2/26/2020—4/1/2020

4/29/2020—6/3/2020

7/8/2020—8/12/2020

9/30/2020—11/4/2020

\*Live weekly webinars will be Wednesdays at 2:00 EST, recordings also available upon request.

# Ascensus Certified Health Savings Professional

## Get a jumpstart as a HSA Professional!



With more than 35 years of experience, Ascensus offers tailored solutions that meet the needs of asset managers, banks, credit unions, state governments, financial professionals, employers and individuals.

### [HSA University](#)

HSA University creates an industry standard in HSA expertise with the accredited Certified Health Savings Professional (CHSP) designation. Expand your HSA knowledge in 75 minutes a week over 5 weeks in a format that is flexible to fit your busy schedule.

This flexible five-week blended learning course combines weekly webinars and self-paced eLearning modules to give you the education and confidence you need to pass the Certified Health Savings Professional (CHSP) exam. Throughout the HSA University, you will attend one weekly 75-minute webinar and complete self-paced on-demand eLearning modules. This blended approach gives you the flexibility to build your HSA knowledge base and become a CHSP without leaving the office.

Registration for HSA University is open to all types of financial organizations and business professionals. The National Association of Federal Credit Unions (NAFCU) has partnered with Ascensus on the certification program and CHSP designation, but both are open to all types of financial organizations.

### Who Should Attend?

Whether you are looking to gain credibility as an expert by earning the industry-recognized CHSP designation or to acquire in-depth, up-to-date knowledge about HSAs, you should attend HSA University.

### What You Will Learn

You will learn and understand the following topics after successfully completing HSA University.

- HSA history and background
- HSA opportunities for your organization
- HSA rules and regulations
- HSA eligibility requirements
- HSA contributions
- HSA distributions
- HSA portability and compliance

### Course Topics and Schedule

- Week 1 – Kickoff and HSA Overview
- Week 2 – Introduction and Establishment
- Week 3 – Funding HSAs
- Week 4 – HSA Distribution Issues
- Week 5 – Portability and Compliance
- Final Online Exam

### Registration Fee

*HSA University* is \$899 and includes the Online CHSP exam. Enroll at [www.cftea.org](http://www.cftea.org).

### IRA University Session Dates

**2/27/2020–3/26/2020**

**4/30/2020–5/28/2020**

**7/9/2020–8/6/2020**

**10/1/2020–10/29/2020**

\*Live weekly webinars will be Thursdays at 3:00 EST, recordings also available upon request.

# Educational Career Paths

Employees are more engaged with an organization that supports education. They are highly motivated about their future when they have a clear understanding of themselves and how their career could develop. Supporting employees in making well-informed choices about industry topics can lead them to have a more optimistic outlook on life, sense of purpose and greater level of contribution that they make to their organization and community. There are economic and social benefits when employees are supported to make effective and educated transitions within their careers.

- Are you a long time employee looking for a place to start your education?
- Are you new to your financial institution or organization? Looking for additional options?

## Contact the CFTEA office to discuss additional educational career paths.

Educational career paths are suggestions to support employees and managers in development opportunities focused in their field. Click on any of the interactive career paths below for guidance with direct links to job-specific certificates, certifications and diplomas.

Our website includes interactive educational career paths in the following areas:

- Accounting
- Administrative Assistant
- Call Center / Customer Care
- Career Development
- Cash Management / Merchant Services
- Commercial Lending
- Compliance
- Consumer Lending
- Credit Analysis
- Deposit Operations / Services
- Digital Banking
- Facilities
- Human Resources
- Information Technology
- Learning and Development
- Loan Operations / Servicing
- Loan Processing
- Loan Underwriting
- Marketing
- Residential Mortgage Lending
- Retail Branches

## What Is Your Next Step?

Don't see a certificate, diploma or certification that meets the needs of your organization? Reach out to the CFTEA office and let us help you create a personalized option that incorporates internal and CFTEA courses. Leverage the power of your unique organization! Ask us!

# Bachelor of Science in Business Administration (BSBA) Banking Major at St. Joseph's College

## Is a degree in banking right for you?

Have you:

- Completed any CFTEA classes listed?
- Earned a banking diploma through CFTEA
- Taken any college courses?
- Completed your Associate's Degree?

If you answered yes to any of these questions, you've already started earning your B.S. in Business Administration with a Banking specialty from Saint Joseph's College of Maine.

Not in Maine? No problem! All of Saint Joseph's College classes are available as distance-learning classes. Wherever you are, you can participate in this degree program!

## THIS PROGRAM'S SPECIAL FEATURES:

- Designed for banking professionals who want to advance their careers.
- Courses are a combination of CFTEA courses and distance education courses from Saint Joseph's College
- Achieve your degree efficiently by earning college credit for select banking credentials.
- Most prior learning and career training qualify as degree credits (e.g. college courses, military training and CEUs).

## BENEFITS OF A DEGREE THROUGH SAINT JOSEPH'S COLLEGE:

- Greater career opportunities.
- Better financial future for you and your family.
- Superior, personalized education with our one-on-one faculty-guided learning.
- Flexibility of completing your course work on your schedule, at your pace, at any location.
- Dedicated student services and support geared to adult learners.

## Credits

Students enrolled in the program must earn 128 semester hour credits, 25% of which must be completed through Saint Joseph's College. Business courses consist of 74 credits, with 12 business core courses (36 semester-hour credits); 11 required specialization core courses (29 semester-hour credits taken through CFTEA), 3 business elective courses (9 semester-hour credits)

## Required Banking Classes taken through CFTEA:

- 1074: Money and Banking
- 1080: Legal Foundations in Banking or BA302: Legal Environment of Business II
- 1370: Principles of Banking
- 1870: Written Communication (1 credit minimum)
- 4310: Supervision
- 5465: Verbal Communication (1 credit minimum)
- 6050: Residential Mortgage Lending or 6047: Real Estate Finance
- 6350: Commercial Lending
- 6920: Analyzing Financial Statements
- 7008: Consumer Lending OR Consumer Lending Certificate
- 7740: Marketing for Bankers

For more information, or to discuss your entry into the program, contact Saint Joseph's College:

Online Admissions: 1-800-752-4723 OR  
email: [info@sjcme.edu](mailto:info@sjcme.edu)

Your SJC admissions counselor will be able to provide information about potential partnership discounts for your institution.

Your CFTEA Contact for the Saint Joseph's College program is [Tammy@cftea.org](mailto:Tammy@cftea.org)

# Certified Modern Supervisor

See Website or Catalog for Dates and Locations (\$1350 value)

\$799



The Today's Supervisor program has been updated with new, relevant materials that speak to the needs of new supervisors in the current and future business world. The modules have been organized to better compliment and build on each section during this interactive program. The final assessment is provided online and the grade is available upon completion. Four day program. Lunch and materials included.

Looking for the next step in your career development? Check out our [Modern Manager Certification!](#)

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## Certificate Components:

### Behavioral Interviewing (2019)

A survey by CareerBuilder found that 69 percent of organizations have been adversely affected by a bad hire in the past year. Leverage behavioral-based interview questions, explore useful techniques for reviewing resumes, identify the elements to look for in candidates' answers to behavioral-based questions and evaluate candidates objectively in this module of the program.

### Ethics in the Workplace (2019)

Being ethical isn't simply doing what's right, because what's right is in the eye of the beholder. Two people can be faced with the same situation and make two different decisions about how to behave and both claim they are doing what's right. Successful completion of this course will increase your knowledge and ability to: dispel common myths about business ethics, describe the ideal ethical workplace, implement ethics guidelines and policies in your organization. Identify and resolve typical ethical dilemmas, recognize common excuses for unethical behavior, and what to do about them, deal with unethical coworkers, customers, and vendors.

### Everything DiSC Management (2019) - (optional)

To effectively coach and interact as a supervisor, it is important to know our style and how that interacts with others that are different from us. The Everything DiSC Management Profile uses a research-validated learning model to create a highly personalized learner experience. The profile is management-specific with in-depth information, including tips, strategies and action plans to help managers become more effective. Includes access to unlimited follow-up reports.

### Diversity Awareness (2019)

A survey by Korn/Ferry International found that more than 2 million people leave their jobs each year because of unfairness in the workplace. The hiring costs which result from high turnover are a huge stumbling block to company success, not to mention the time investment that goes into screening applicants and acclimating new hires to their role. Still, the greatest hindrance to progression lies within the heart of the issue—that is, to devalue and exclude employees because they are different is to also place limitations on their contributions and ability to grow. From fundamental attribution errors to microinequities (a term coined by researcher Mary Rowe), *Diversity Awareness: Fostering an Environment of Inclusivity, Sensitivity and Respect in the Workplace*, explores the subtle ways that these limitations occur and how to combat them by fostering an environment that focuses on building respectful interactions.



# Modern Supervisor Certificate

See Website or Catalog for Dates and Locations

\$799



## Certificate Components:

### Coaching for Development (2019)

To remain competitive, companies need to retain valuable employees, address problems that interfere with productivity and help employees achieve their full potential. A Society for Human Resources study revealed that 55 percent of organizations use or have used formal coaching programs to aid in their employees' development. The ability to coach helps you increase your employees' commitment and level of engagement, and helps you avoid and handle problems that interfere with working relationships and productivity. Coaching others can also make it easier for you to achieve your goals and make you more valuable to your organization.

### Toughest Supervisor Challenges (2019)

Every job has challenges. Everyone has to master the skills necessary to succeed in a particular position. What sets you (supervisors) apart from other positions is that you manage people. So your toughest challenges will be employee related issues. Supervising others can be rewarding and give you a sense of accomplishment when you see employees grow and succeed. But supervising others can also be a big headache when employees don't show up on time, don't do what they're supposed to do, fight with each other, etc. The focus in this module will be on taking the time to do the right thing in these situations for the long-term success of the organization, the employees, and you.

### How to Handle Change and Upheaval (2019)

Change is inevitable, in organizations and in life. Learn the intricacies of change and how to handle resistance to change. Successful completion of this course will increase your knowledge and ability to: evaluate typical attitudes toward change, recognize the signals of change-related stress, understand the four parts of the change cycle, apply positive strategies for coping with change.

### Ongoing Performance Development (2019)

Performance management is more than the annual evaluation. This session delivers information to help managers deal with poor performance, negative behavior or simply constructive feedback as needed. We will cover guidelines for recognizing the opportunity and formulating the discussion to help develop employees.

### Delegating for Growth (2019)

Delegating for Growth is an interactive skills training course that will help any manager to better understand the purpose of delegation, prepare for and apply the steps to delegating effectively, and learn to recover from inevitable mistakes or disappointments. This training program will help to increase company-wide productivity, foster employee confidence at all levels, and develop a team-driven culture. projects can be delegated. In particular, if you find yourself doing the tasks and activities you were promoted from, that's a clear sign of items you should be delegating. Not sure how? that's where this module comes into play.

**Online Assessment (2019)** Grade received immediately upon completion. Free re-take included with exam.

## Instructor Led Online

Subject matter expert instructors guide learning outcomes and support. The instructor is available to answer questions and provide feedback on your assignments. Each week you will receive an assignment over the Internet. The assignments may include reading a chapter in your text, completing an assignment to post on the discussion board, taking a self-check test, or collaborating with other students using discussion boards and email.

## Guided Learning (formerly Assisted Self Study)

If you find attending live classes difficult with your busy schedule and family obligations, and online training is not your preference, Guided Learning is a powerful option. For each Guided Learning class you will be required to study on your own; however, you will have an instructor available to assist with material. Upon registering for a Guided Learning class you will receive the class material within two weeks including an introduction letter, a syllabus and instructions for working through and completing your chosen class.

## Live and In-House

Live and In-House training options provide face-to-face access to the instructor as well as fellow learners. Instructors are subject matter experts that support a format that allows for active discussion and material exploration related to challenges in today's ever-changing business world. Students attend in-person at a specified location, time and while connecting with fellow learners in their field. Sessions are held at various locations throughout Maine, New Hampshire, Vermont and Virginia!

## On Demand

On Demand training allows you to control and schedule your course at a time that is convenient to you. Courses start the beginning of every month, have access to virtual office hours with an instructor, contain expert video content and the latest engagement tools to keep your learning active and fun. The demands of daily life and a career require flexible choices that complement professional development and educational career paths. On Demand is a new and exciting choice for students in today's busy world.

## Self-Paced eLearning

Self-Paced eLearning topics that provide high flexibility for busy students while balancing a high quality experience. These programs include a mixture of instruction, case studies, assessments, exercises, videos, engaged learning structures and job aids. The topics covered are relevant in an ever-changing business environment. Self-Paced eLearning content is delivered in partnership with ABA, Ascensus, HRDQ, MindEdge and OnCourse. All our partners have earned national recognition, customer loyalty and an unmatched reputation for engagement and results in the learning and development field.

## Seminars

Various seminars are conducted throughout Maine, New Hampshire, Vermont and Virginia. Seminars allow for live, small group discussions on focused topics in business and professional development. Instructors are subject matter experts and provide key insights into professional growth in highly specialized topics.

## Webcourse

Webcourse options combine the personal interaction of a live class with the convenience of attending a class anywhere you have an Internet and phone connection. With a set date and time, students interact by preparing homework assignments for classroom discussion and reviewing instructor materials discussed with the class. Through engaged learning, students participate in "classroom" discussions and ask instructor questions. Finish the class in fewer sessions earning the same credits as comparable Live class options.

## Webinars

CFTEA's partnership with Total Training Solutions allows access to a large variety of training programs and subject matter experts for financial institutions of all sizes in the area of compliance, IRAs, teller skills, credit analysts, security and operations. This type of training program combines the clarity of a conference call with the interactions and visual presentation online. With a speakerphone and projector, an entire room of attendees can participate at the same low cost. If an internet connection is not available, students may participate by listening to the program over the telephone and following along with written materials.

Unable to attend at the scheduled time? Programs are available for playback at a time that convenient for organizations and their employees. View all of the topics available on our website.

New Horizons Computer Learning Centers is proud to be a learning partner with the CFTEA.



**For over 30 years New Horizons** has been improving the skills of corporate employees and individuals everywhere. We are a leading provider of IT, Desktop Applications, Project Management and Business Skills courses. As a learning solutions provider for many of the industry's top vendors such as Microsoft, VMware, and Cisco, we are positioned to offer the latest authorized classes delivered by certified subject matter experts. With the largest Guaranteed-To-Run schedule in the industry, you can choose from hundreds of course titles and thousands of class dates to find the right solution for you.

- |                     |                          |                         |
|---------------------|--------------------------|-------------------------|
| Adobe               | Google                   | Power Hours             |
| Agile               | Internet of Things (IoT) | Quickbooks              |
| Amazon Web Services | ITIL/Service Management  | Enterprise Linux        |
| Business Analysis   | Leadership & Development | Reporting and Analysis  |
| Business Skills     | Lean Six Sigma           | Scrum                   |
| Cisco               | Microsoft Office         | Security                |
| CompTIA             | Microsoft Technical      | VMware                  |
| Database            | Oracle                   | Web and App Development |
| DevOps              | Project Management       |                         |

We accept Microsoft SATVs, Cisco Learning Credits (CLCs) and VMware Training Vouchers.



EVERYTHING **DiSC**  
 WORKPLACE®  
 PROFILE

# Build more effective relationships



**The *Everything DiSC Workplace® Profile* provides participants with valuable insights that will help them better understand themselves AND others, all while offering actionable ways to strengthen their relationships in the workplace.**

Using a research-validated learning model, the profile offers personalized insights for participants, helping them discover how to better connect and effectively work with each other. *Everything DiSC Workplace* can be used with people at any level in an organization, ultimately improving the quality of the workplace.

With the *Everything DiSC Workplace® Profile*, your employees will:

- Discover their DiSC® style
- Understand other styles
- Build more effective relationships
- Explore People-Reading and Comparison Reports (Optional)

## The Profile

The *Everything DiSC Workplace® Profile* provides an in-depth, workplace-specific 20-page report with increased personalization, providing a better overall experience.

Online tailoring makes it easy to remove or rearrange profile pages, customize the profile title, or print selected pages. The profile may be used on its own or with the companion facilitation; sold separately.

**Simple. Powerful. Low-Cost. Effective.**

For more information, contact Andrew at [Andrew@cfta.org](mailto:Andrew@cfta.org)



## Exciting Follow-Up Tools

**MyEverythingDiSC®:** Keeps participants engaged beyond the profile. MyEverythingDiSC provides powerful, personalized tools and resources at no extra cost. Participants can:

- Access their DiSC profile anytime, with any device
- Compare their DiSC style with their colleagues and explore similarities and differences
- Learn more about how their DiSC style impacts workplace relationships and productivity
- Build better working relationships through effective communication tips
- Deepen their understanding of the theory and research behind Everything DiSC
- Create Customer Interaction Maps for improving sales relationships (Exclusive to *Everything DiSC Sales*)

**Everything DiSC Comparison Reports:** This 10-page report can be created for any two participants. Shows their similarities and differences on six behavioral continua and provides action steps to build a more effective working relationship with each other. Great for on-boarding, new work groups, conflict management, and more! Unlimited access available with all *Everything DiSC* profiles.

**Everything DiSC Group Culture Report:** Helps you determine the group's DiSC® culture, explore its advantages and disadvantages, discuss its effect on group members, and examine its influence on decision making and risk taking. English only. Sold separately.



**MyEverythingDiSC helps people stay engaged with EverythingDiSC whether they're in the office or on the go with their smartphone or tablet.**

## Individual Assessments

Course # C1061.....\$80/pp



## Team and Organization Live Workshops

Course # C1062L.....\$350/pp

Call to Schedule

Facilitated by Cynthia Stuart

cftea.org

# OnCourse Learning

Self-Paced E-Learning Certificates



Formerly Banker's Edge, OnCourse Learning allows the power of key banking and credit union knowledge to be paired with a nimble approach that truly listens to the needs of students. Individual courses are listed \$109 each.

## Highlighted Certificates:

**Consumer Lending (in Partnership with eEnsign)**: This unique cost effective series gives employees the tools they need to verify key information, understand consumer regulations, underwrite the loan and follow up to minimize fraud. This certificate is recommended for: consumer lenders, underwriting staff, branch managers, assistant branch managers, operations staff and platform assistants.

- **Consumer Lending Certificate, Tuition: \$550**

*Courses Included: Following up on the Loan, Government Regulations and the Lending Process, Introduction to Consumer Credit, Investigating the Applicant, Making Decisions, Preventing Fraud, Processing the Loan, Taking the Loan Application, The Five Stage Lending Process and Credit Skills Diagnostic Assessment.*

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**Service Experience:** To be a leader in the marketplace, employees at every touch point must go the extra mile and deliver a consistent, world-class experience. Learn how to provide stellar customer service that will set your institution apart from the competition.

- **Banking Customer Service Experience Certificate, Tuition: \$910**

*Courses Included: Customer Service, Showing Customers You Care, Using Language to Service the Customer, Opening the Conversation, Diagnosing Customer Needs, Responding to Customer Requests, Taming Challenging Conversations, That's a Wrap—Closing the Conversation.*

- ◆ **Credit Union Member Service Experience Certificate, Tuition: \$910**

*Courses Included: Member Service, Showing Customers You Care, Using Language to Service the Customer, Opening the Conversation, Diagnosing Customer Needs, Responding to Customer Requests, Taming Challenging Conversations, That's a Wrap—Closing the Conversation*

# CFTEA powered by MindEdge

## Accredited Courses & Certificates

Created by Harvard & M.I.T. Educators

Serving over a million students and improving the way students learn



### Certificate in Business Communication—Course # M1029SP 25 Hrs \$299

**Bundle Discount Includes Courses:** Communicate Collaboratively, Effective Business Writing, Effective E-Mails, Memos and Letters, Effective Presentations, Effective Public Speaking.

Communicating clearly and concisely in written and oral formats is critical to your professional success. From clarifying and structuring your ideas to designing the PowerPoint slides that will best complement them, the techniques, interactive exercises, and checklists in this certificate program will help you create presentations and workplace documents that inform and persuade.



### Certificate in Creativity and Innovation—Course # M5003SP 22 Hrs \$249

**Bundle Discount Includes Courses:** Creativity in Teams and Organizations, Innovation in Teams & Organizations, Introduction to Critical Thinking, Personal Creativity.

Because organizations must innovate to stay alive in today's highly competitive marketplace, organizations need employees who can channel their creativity and innovation toward organizational challenges and goals. This certificate program will give a set of tools that allow you to leverage your creativity to identify and solve organizational problems and asks how you might look at a problem from a different angle to produce a more creative result.



### Starting Your Own Non-Profit—Course # M1201SP 4 Hrs \$79

This course is a how-to guide for anyone who's got a great idea about how to give back to the community—but doesn't know how to turn that idea into a reality. The course begins by considering a fundamental question: Is starting a nonprofit the best way to achieve your philanthropic goals? For those who answer "Yes," the course then discusses the key steps in getting a nonprofit off the ground, including incorporating your organization; applying for tax-exempt status; drafting a business plan; choosing a board of directors and writing bylaws for the organization; recruiting employees and managing volunteers; and addressing the crucial issue of fundraising. Rich with videos and interactive content, this course provides a detailed and highly practical introduction to the fast-growing world of nonprofits.



### Certificate in Entrepreneurship—Course # M1359SP 25 Hrs \$599

**Bundle Discount Includes Courses:** Accounting and Finance for Entrepreneurs, Business Law for Entrepreneurs, Introduction to Entrepreneurship, Leadership and Management for Entrepreneurs, Strategic Marketing for Entrepreneurs.

This online certificate program introduces key issues in entrepreneurship for those looking to start a business on their own. What does it take to build and grow a business from scratch? What personal characteristics are shared by successful entrepreneurs? What types of resources are available to budding entrepreneurs, and where can you find them? Learners who complete this program will have the answers to those questions and others that are essential to the success of their businesses.

# CFTEA powered by MindEdge

## Accredited Courses & Certificates

Created by Harvard & M.I.T. Educators

Serving over a million students and improving the way students learn



### Certificate in Digital Marketing—Course # M1030SP 30 Hrs \$549

**Bundle Discount Includes Courses:** Content Marketing, Conversion Rate Optimization, Digital Marketing Strategy, Marketing Automation, Mobile Marketing, Paid Search (PPC), Search Engine Optimization, Social Media Marketing, Web Analytics.

This certificate in digital marketing is aligned with the Online Marketing Certified Professional (OMCP) standards to ensure that it is comprehensive and relevant. Courses in this certificate cover the strategic issues, marketing methods and tactics, industry terminology, and best practices. Each of the nine courses offer examples, videos from industry-leading practitioners, interactive games, and review questions to ensure mastery of the material.



### Certificate in Finance Essentials—Course # M5061SP 19 Hrs \$399

**Bundle Discount Includes Courses:** Financial Planning and Control, How to Read a Financial Statement, Introduction to Business Statistics, Introduction to Finance, Time Value of Money and Risk, Understanding and Managing Budgets.

This program introduces non-financial managers to the essentials of finance and will help you become conversant in critical financial terminology while learning how to calculate key financial management indicators. Assess your organization's financial health by reviewing balance sheets, income statements, and statements of cash flow, and you will discover how finance and accounting tools can be used to support a manager's informed decision making within organizations.



### Certificate in Human Resource Management—Course # M1200SP 21 Hrs \$399

**Bundle Discount Includes Courses:** Compensation and Benefits, Data and Human Resource Management, Employee Selection, Equal Employment Opportunity, Introduction to Human Resource Management, Performance Management, Talent Management and Career Development.

An effective human resource management strategy is a valuable asset to any company. This suite of courses will teach you the basics of managing the benefits and policies that support an effective staff. What does an employer need to know about anti-discrimination regulations? What are the key aspects of pay policies? How can employers avoid the traps of the employee selection process?



### Certificate in Introduction to Leadership—Course # M5013SP 18 Hrs \$199

**Bundle Discount Includes Courses:** Introduction to Leadership, Leaders and Work-Life Balance, Leading Teams, Leading and Managing Change.

What is leadership and why is it important? How does a leader encourage change without triggering fearful resistance? What are the key elements to leading an effective team? What is the role of charisma in leadership? Based on D. Quinn Mills' book, Leadership: How to Lead, How to Live, a text used at Harvard Business School, the courses in this suite offer advice on leadership that can help you stand out as a leader among your peers.



# CFTEA powered by MindEdge

## Accredited Courses & Certificates

### Created by Harvard & M.I.T. Educators

Serving over a million students and improving the way students learn



#### Certificate in Non-Profit Management—Course # M1130SP 44 Hrs \$699

**Bundle Discount Includes Courses:** Budgeting in a Nonprofit Organization, Capital Campaigns, Fundraising for Nonprofit Organizations, How to Read a Nonprofit Financial Statement, Introduction to Grant Writing, Introduction to Nonprofit Management, Leadership in a Nonprofit Organization, Nonprofit Board and Volunteer Development, Principles of Marketing for Nonprofit Organizations, Social Media for Nonprofits, Strategy for Nonprofit Organizations. [See also, How to Start Your Own Non-Profit]

This online certificate program introduces learners to key current management issues for nonprofit organizations. Fundraising, board and volunteer development, budgeting, reading financial statements, leadership, marketing, and setting strategic direction are all addressed, and video commentary on these crucial topics will give you insight into how nonprofit professionals apply key concepts in their own organizations.



#### Certificate in Cybersecurity—Course # M9015SP 40 Hrs \$499

**Bundle Discount Includes Courses:** Asset Security, Communication and Network Security, Identity and Access Management, Security and Risk Management, Security Assessment and Testing, Security Engineering, Security Operations, Software Development Security. [See also, Real-World Cloud Cybersecurity Scenarios and Real-World Cybersecurity Scenarios]

Cybersecurity, also known as Information Security, is the protection of data and personally identifiable information from malicious attacks, theft, and destruction. Failures of cybersecurity policies, both in large corporations and governmental agencies, have earned significant visibility and negative publicity in recent months and years. As the amount of data being stored continues to increase, and as hackers become more sophisticated, the need for cybersecurity is greater than ever.



#### Certificate in Data Analytics—Course # M1131SP 30 Hrs \$399

**Bundle Discount Includes Courses:** Data Analysis for Improving Organizational Performance, Data Analysis in the Real World, Introduction to Data Analysis, Statistical Process Control, Statistics as a Managerial Tool, Tools of Data Analysis.

This certificate in data analytics provides an overview of topics in statistics and their applications in a variety of fields. This certificate will present the basics of quantitative analysis and its increasing use in today's professional landscape. Learners are exposed to quantitative decision-making tools and techniques, which tie into real-world case studies.

Plus.

Certificate in Agile Project Management

Certificate in Project Management for Teams

Leadership for Women in Business

Security Awareness

Certificate in Project Management for Information Technology

Certificate in Project Management Team Leadership

Small Business Management

Certificate in Emergency Management

# CFTEA Short, Self-Paced eLearning Professional Development Certificates

Interactive case studies, exercises and quizzes developed by CFTEA

## Essential Professional Development Certificate—Course # H5037SP \$200

Bundle Discount Includes Courses: Balancing Priorities, Creative Problem Solving, Developing Positive Relationships, Effective Listening Skills, How to Manage Your Emotions, Productive Work Habits.

Develop critical business skills in today's workplace to meet challenges and be successful.

## Advanced Professional Development Certificate —Course # H5039SP \$200

Bundle Discount Includes Courses: Assertiveness Skills, Ideas into Action, Mental Models, Resilience, Handling Workplace Conflict, Why We Struggle with Tough Decisions.

Develop a deeper level of critical business skills in today's workplace to meet challenges and be successful.

## Foundational Professional Development Certificate —Course # H5039SP \$250



Bundle Discount Includes Courses: Balancing Priorities, Essentials of Workplace Conduct, Diversity Awareness, The Business of Listening, Ideas into Action, Leaders and Work-Life Balance, Networking for Success, Personal Branding, Resilience.

Develop professional development soft skills as a foundation to advance within your career and workplace.

## Professional Development for Supervisors Certificate—Course # H5048SP \$200

Bundle Discount Includes Courses: Adapting Your Leadership Style, Coaching for Development, Developing Your Direct Reports, Diversity Awareness, Employee Engagement, Leading Others Through Change.

Continue growth as a supervisor through these interactive courses that keep your skills as a supervisor sharp and ever-growing.

## Advanced Professional Development for Supervisors Certificate—Course # H5049SP \$300

Bundle Discount Includes Courses: Assertiveness Skills, Behavioral Interview Skills, Business Etiquette for Supervisors, Critical Thinking Skills, Delegating for Growth, Fundamentals of Strategic Planning, Meetings That Work, Navigating Difficult Conversations, Skillful Collaboration, Taking Control of Conflict, Team Excellence, The Art of Influencing Others, Why We Struggle with Tough Decisions.

Growing in the role of a supervisor brings new challenges and opportunities. Continue professional development through these interactive courses that keep your skills as a supervisor sharp and ever-growing.

## Sales Essentials Certificate—Course # H5046SP \$200

Bundle Discount Includes Courses: Developing Clients for Life, Opening the Sales Call, Presenting, Overcoming and Closing, Prospecting and Territory Management, Understanding the Sales Cycle, What to Ask, How to Listen.

Sales are the core of every business, and the barometer through which growth is measured. These interactive course are designed for those new or seasoned with sales to provide success.

# Courses: Business Skills

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
30 Steps to Audit a Safe Deposit Department	C1441WC	Webcourse	4/22/2020 10:00am - Noon	2 hours		David M.	1/4	\$150 live / \$99 recorded
40 Steps to Make Safe Deposit Boxes a Profit Center	C1443WC	Webcourse	1/29/2020 10:00am - Noon	2 hours		David M.	1/4	\$150 live / \$99 recorded
Accounting and Finance for Entrepreneurs (powered by MindEdge)	M1360SP	Self Paced		5 hours		Online	1/4	\$ 129
Accounting Fundamentals for Small Business (powered by MindEdge)	M1366SP	Self Paced		5 hours		Online	1/4	\$ 99
Accounting, Financial	C1131GL	Guided Learning		6 months		Brooke L.	3	\$ 450
Accounting, General	A1000ILO	Instructor Led Online	03/16/2020	16 weeks		Online	3	\$ 600
Accounting, General	A1000ILO	Instructor Led Online	07/20/2020	16 weeks		Online	3	\$ 600
Accounting, General	A1000ILO	Instructor Led Online	11/09/2020	16 weeks		Online	3	\$ 600
Accounting, General	C1000GL	Guided Learning		6 months		Brooke L.	3	\$ 450
Accounting, General	C1000OD	On Demand	Coming Soon	6 months		Brooke L.	3	\$ 450
<b>Accounting, General - ON SALE</b>	<b>C1000WC</b>	<b>Webcourse</b>	<b>1/20/2020 for 10 weeks 6:00-8:00pm</b>	<b>10 weeks</b>		<b>Tanya K.</b>	<b>3</b>	<b>\$ 350</b>
Achieving Unclaimed Property Compliance Best Practices for Banking Industry	T1177SP	Self Paced		2 hours		Online	1/4	\$ 295
An Admin's Guide to Events (FREE)	C1342SP	Self Paced		1 hour		Online	1/4	\$ -
An Admin's Guide to Travel (FREE)	C1341SP	Self Paced		1 hour		Online	1/4	\$ -
Analyzing Bank Performance	A1001ILO	Instructor Led Online	01/27/2020	7 Weeks		Online	3	\$ 875
Analyzing Bank Performance	A1001ILO	Instructor Led Online	05/18/2020	7 Weeks		Online	3	\$ 875
Analyzing Bank Performance	A1001ILO	Instructor Led Online	09/14/2020	7 Weeks		Online	3	\$ 875
Assertiveness Skills	H5224SP	Self Paced		3 hours		Online	1/4	\$ 60
Balancing Priorities	H1061SP	Self Paced		3 hours		Online	1/4	\$ 60
Balancing Priorities	H1061GL	Guided Learning		4 months		Tammy P.	1/4	\$ 200
Balancing Priorities	H1061LM	Live	2/19/2020 for 2 weeks 6:00-8:00pm	2 weeks	Machias, Maine	Wendy S.	1/4	\$ 200
			Machias Savings Bank, 4 Center Street, Machias, Maine					
Balancing Priorities	H1061LV	Live	3/3/2020 for 2 weeks 6:00-8:00pm	2 weeks	Lyndonville, Vermont	Amanda B.	1/4	\$ 200
			Passumpsic Bank, 62 Broad Street, Lyndonville, Vermont					
Bank Marketing: Building Customers Relationships	A1003SP	Self Paced		12 min		Online		\$ 55
Bank Security	C1004GL	Guided Learning		4 months		Andrew L.	1/2	\$ 245
Bank Solutions Provider Certificate	A1005SP	Self Paced		6 hours		Online		\$ 495
Bank Teller Certificate	A1006SP	Self Paced		13 hours		Online		\$ 695
Banking Basics Suite	A1002SP	Self Paced		2 hours		Online		\$ 595

For more information, detailed course descriptions are located at [www.cftea.org](http://www.cftea.org)

# Courses: Business Skills

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
Banking Customer Service Experience Certificate	O5048SP	Self Paced		14 hours		Online		\$ 910
Banking Fundamentals 1: The Banking Industry (Principles of Banking 1)	A1010ILO	Instructor Led Online	01/06/2020	4 weeks		Online	1	\$ 215
Banking Fundamentals 1: The Banking Industry (Principles of Banking 1)	A1010ILO	Instructor Led Online	04/06/2020	4 weeks		Online	1	\$ 215
Banking Fundamentals 1: The Banking Industry (Principles of Banking 1)	A1010ILO	Instructor Led Online	07/06/2020	4 weeks		Online	1	\$ 215
Banking Fundamentals 1: The Banking Industry (Principles of Banking 1)	A1010ILO	Instructor Led Online	09/08/2020	4 weeks		Online	1	\$ 215
Banking Fundamentals 2: Bank Lines of Business (Principals of Banking 2)	A1008ILO	Instructor Led Online	01/27/2020	4 weeks		Online	1	\$ 215
Banking Fundamentals 2: Bank Lines of Business (Principals of Banking 2)	A1008ILO	Instructor Led Online	03/09/2020	4 weeks		Online	1	\$ 215
Banking Fundamentals 2: Bank Lines of Business (Principals of Banking 2)	A1008ILO	Instructor Led Online	06/08/2020	4 weeks		Online	1	\$ 215
Banking Fundamentals 2: Bank Lines of Business (Principals of Banking 2)	A1008ILO	Instructor Led Online	10/12/2020	4 weeks		Online	1	\$ 215
Banking Fundamentals 3: Building Customer Relationships (Principles of Banking 3)	A1009ILO	Instructor Led Online	02/03/2020	4 weeks		Online	1	\$ 215
Banking Fundamentals 3: Building Customer Relationships (Principles of Banking 3)	A1009ILO	Instructor Led Online	05/04/2020	4 weeks		Online	1	\$ 215
Banking Fundamentals 3: Building Customer Relationships (Principles of Banking 3)	A1009ILO	Instructor Led Online	06/15/2020	4 weeks		Online	1	\$ 215
Banking Fundamentals 3: Building Customer Relationships (Principles of Banking 3)	A1009ILO	Instructor Led Online	08/03/2020	4 weeks		Online	1	\$ 215
Banking Fundamentals 3: Building Customer Relationships (Principles of Banking 3)	A1009ILO	Instructor Led Online	11/30/2020	4 weeks		Online	1	\$ 215
Banking Fundamentals Bundle (The Banking Industry, Bank Lines of Business and Building Customer Relationships)- <b>Principles of Banking</b>	A1007BILO	Instructor Led Online	See Courses	12 weeks		Online	3	\$ 595
Banking Today	C1011GL	Guided Learning		4 months		Tammy P.	1/2	\$ 245
Banks and Personal Wealth Management	A1012SP	Self Paced		10 min		Online		\$ 55
Banks and the Deposit Function	A1013SP	Self Paced		10 min		Online		\$ 55
Banks and the Economy	A1014SP	Self Paced		10 min		Online		\$ 55
Banks as a Business	A1015SP	Self Paced		10 min		Online		\$ 55
Basic Administrative Duties of a Trustee	A1016ILO	Instructor Led Online	04/20/2020	5 weeks		Online	1	\$ 300
Basic Administrative Duties of a Trustee	A1016ILO	Instructor Led Online	09/28/2020	5 weeks		Online	1	\$ 300
Body Language for Women in Business	M1866SP	Self Paced		3 hours		Online	1/4	\$ 79
Branch Manager Bootcamp 2 Day Certificate: The Evolving Role of the Branch Manager	C1017BL	Live	5/6/2020 & 5/7/2020 8:00AM- 5:00PM	2 days	New Gloucester, Maine	Jennie S.	2	\$ 699
			Pineland Conference Center, 16 Pineland Drive, New Gloucester, Maine					
Branch Manager Certificate	A1022SP	Self Paced		14 hours		Online		\$ 1,295
Budgeting and Financial Analysis for Small Business (powered by MindEdge)	M1367SP	Self Paced		5 hours		Online	1/4	\$ 99
Business and International Banking Services	A1023SP	Self Paced		12 min		Online		\$ 55
Business Law for Entrepreneurs (powered by MindEdge)	M1361SP	Self Paced		5 hours		Online	1/4	\$ 129
Business Math	C1128GL	Guided Learning		6 months		Tammy P.	3	\$ 450

For more information, detailed course descriptions are located at [www.cftea.org](http://www.cftea.org)

# Courses: Business Skills

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
Business Telephone Skills	H1333SP	Self Paced		3 hours		Online	1/4	\$ 60
Business Telephone Skills	H1333LM	Live	1/28/2020	2 weeks	Machias, Maine	Wendy Sc.	1/4	\$ 200
			Machias Savings Bank, 4 Center Street, Machias, Maine					
Business Telephone Skills	H1333LV	Live	4/7/2020	2 weeks	Lyndonville, Vermont	Amanda B.	1/4	\$ 200
			Passumpsic Bank, 62 Broad Street, Lyndonville, Vermont					
Business Telephone Skills	H1333GL	Guided Learning		4 months		Tammy P.	1/4	\$ 200
Calling on Small Business Customers	A1025SP	Self Paced		1.5 hours		Online		\$ 95
Calming Upset Customers	C1026GL	Guided Learning		4 months		Tammy P.	1/2	\$ 245
Certificate in Bank Financial Management	A1028SP	Self Paced				Online		\$ 2,195
Certificate in Business Communication (powered by MindEdge)	M1029SP	Self Paced		25 hours		Online	1	\$ 299
Certificate in Data Analytics (powered by MindEdge)	M1131SP	Self Paced		30 hours		Online	2	\$ 399
Certificate in Digital Marketing (powered by MindEdge)	M1030SP	Self Paced		30 hours		Online	2	\$ 549
Certificate in Emergency Management (powered by MindEdge)	M1369SP	Self Paced		10 hours		Online	1/2	\$ 199
Certificate in Entrepreneurship (powered by MindEdge)	M1359SP	Self Paced		25 hours		Online	2	\$ 599
Certificate in Foundational Bank Marketing	A1064SP	Self Paced		21 hours		Online		\$ 1,195
Certificate in Fraud Prevention	A1031SP	Self Paced				Online		\$ 795
Certificate in Human Resource Management (powered by MindEdge)	M1200SP	Self Paced		21 hours		Online	1	\$ 399
Certificate in Non-Profit Management (powered by MindEdge)	M1130SP	Self Paced		44 hours		Online	2	\$ 699
Certificate in Small Business Management (powered by MindEdge)	M1365SP	Self Paced		13 hours		Online	1/2	\$ 277
Certificate in Trust 1: Foundational	A1034SP	Self Paced		10 hours		Online		\$ 1,495
Certificate in Trust 2: Intermediate	A1035SP	Self Paced		18 hours		Online		\$ 2,295
Certificate in Trust 3: Advanced	A1036SP	Self Paced		14 hours		Online		\$ 2,295
Certified Modern Banking Representative (Bundle Discount and Exam)	C5061GL	Guided Learning		9 months		Tammy P.	2	\$ 999
Certified Modern Banking Representative Exam	C0001EX	Self Paced		2 hours		Online		\$ 100
Certified Modern Branch Professional - Level 1 (Bundle Discount and Exam)	C5062GL	Guided Learning		9 months		Tammy P.		\$ 1,499
Certified Modern Branch Professional - Level I Exam	C0002EX	Self Paced		2 hours		Online		\$ 100
Certified Modern Branch Professional - Level II Exam	C0003EX	Self Paced		2 hours		Online		\$ 100
Communicating Collaboratively (powered by MindEdge)	M1037SP	Self Paced		5 hours		Online	1/2	\$ 79
Communication Basics Suite	A1038SP	Self Paced		20 min		Online		\$ 55
Creative Problem Solving	H1032SP	Self Paced		3 hours		Online	1/4	\$ 60
Creative Problem Solving	H1032GL	Guided Learning		4 months		Tammy P.	1/4	\$ 200

For more information, detailed course descriptions are located at [www.cftea.org](http://www.cftea.org)

# Courses: Business Skills

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
Creativity in Teams and Organizations (powered by MindEdge)	M1044SP	Self Paced		5 hours		Online	1/2	\$ 79
Credit Union Member Service Experience Certificate	O5049SP	Self Paced		14 hours		Online		\$ 910
Critical Thinking Skills	H1345SP	Self Paced		3 hours		Online	1/4	\$ 60
Cultural Competency	H1346SP	Self Paced		3 hours		Online	1/4	\$ 60
Customer Service Representative Certificate	A1046SP	Self Paced		10 hours		Online		\$ 795
Deposit Accounts & Services	C1048GL	Guided Learning		6 months		Andrew L.	2	\$ 350
Deposit Products & Services for Small Businesses	A1049SP	Self Paced		30 min		Online		\$ 95
Developing Positive Work Relationships	H1348SP	Self Paced		3 hours		Online	1/4	\$ 60
Diversity Awareness	H1050SP	Self Paced				Online	1/4	\$ 60
Diversity Awareness	H1050GL	Guided Learning		4 months		Andrew L.	1/2	\$ 245
Do You Know Who Your Competitors Really Are? Is Your Financial Institution Competing with FinTech?	A1334SP	Self Paced		2 hours		Online	1/4	\$ 210
Effective Business Writing (powered by MindEdge)	M1053SP	Self Paced		5 hours		Online	1/2	\$ 99
Effective Emails, Memos and Letters (powered by MindEdge)	M1054SP	Self Paced		5 hours		Online	1/2	\$ 79
Effective Presentations (powered by Mind- Edge)	M1055SP	Self Paced		5 hours		Online	1/2	\$ 99
Effective Public Speaking (powered by MindEdge)	M1052SP	Self Paced		5 hours		Online	1/2	\$ 99
Effective Referrals Suite	A1056SP	Self Paced		15 min		Online		\$ 55
Essential Selling Skills Bundle	A1057SP	Self Paced		1.5 hours		Online		\$ 495
Ethical Issues for Bankers	A1058SP	Self Paced		25 min		Online		\$ 55
Ethics in the Workplace	H1059SP	Self Paced		25 min		Online	1/4	\$ 60
Event Networking	A1060SP	Self Paced		1 hour		Online		\$ 95
Everything DiSC Workplace Course Work- shop (Teams and Organizations)	C1062L	Live	Call to Schedule 9:00AM- 4:00PM	Full Day		Cynthia S.	1/2	\$ 350
Everything DISC Workplace Individual As- sessment	C1061SP	Self Paced		2 hours		Online		\$ 80
Fighting Fraud: Top 10 Scams Targeting Our Nation's Seniors (2018) - FREE	C1063SP	Self Paced		3 hours		Online	1/4	\$ -
Financial Elder Abuse	A1063SP	Self Paced		25 min		Online		\$ 55
Financial Elder Abuse	C1063GL	Guided Learning		4 months		Andrew L.	1/4	\$ 200
Financial Planning and Control (powered by MindEdge)	M1220SP	Self Paced		3 hours		Online	1/4	\$ 79
Frauds, Scams and Cons	C1065BGL	Guided Learning		4 months		Andrew L.	1	\$ 300
Fundamentals of Chat Writing (FREE)	C1340SP	Self Paced		1 hour		Online	1/4	\$ -
Future of Business, The	CA1071ILO	Instructor Led Online	05/18/2020	12 weeks		Online	3	\$ 645
Future of Business, The	CA1071ILO	Instructor Led Online	08/31/2020	12 weeks		Online	3	\$ 645

For more information, detailed course descriptions are located at [www.cftea.org](http://www.cftea.org)

# Courses: Business Skills

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
Handling Workplace Conflict	H1062SP	Self Paced				Online	1/4	\$ 60
Handling Workplace Conflict	H1062GL	Guided Learning		4 months		Tammy P.	1/4	\$ 200
How to Avoid Safe Deposit Litigations	C1442WC	Webcourse	11/18/2020 10:00am - Noon	2 hours		David M.	1/4	\$150 live / \$99 recorded
How To Make Yourself Indispensable	H1349SP	Self Paced		3 hours		Online	1/4	\$ 60
How to Read a Financial Statement (powered by MindEdge)	M1221SP	Self Paced		3 hours		Online	1/4	\$ 79
HR - Compensation and Benefits (powered by MindEdge)	M1211SP	Self Paced		3 hours		Online	1/4	\$ 79
HR - Data and Human Resource Management (powered by MindEdge)	M1212SP	Self Paced		3 hours		Online	1/4	\$ 79
HR - Employee Rights (powered by MindEdge)	M1213SP	Self Paced		3 hours		Online	1/4	\$ 79
HR - Employee Safety (OSHA) (powered by MindEdge)	M1214SP	Self Paced		3 hours		Online	1/4	\$ 79
HR - Employee Selection (powered by MindEdge)	M1215SP	Self Paced		3 hours		Online	1/4	\$ 79
HR - Equal Employment Opportunity (powered by MindEdge)	M1216SP	Self Paced		3 hours		Online	1/4	\$ 79
HR - Introduction to Human Resource Man- agement (powered by MindEdge)	M1217SP	Self Paced		3 hours		Online	1/4	\$ 79
HR - Performance Management (powered by MindEdge)	M1218SP	Self Paced		3 hours		Online	1/4	\$ 79
HR - Talent Management and Career Devel- opment (powered by MindEdge)	M1219SP	Self Paced		3 hours		Online	1/4	\$ 79
Human Relations	C1073GL	Guided Learning		6 months		Tammy P.	3	\$ 450
Human Resource Management	C1099GL	Guided Learning		6 months		Tammy P.	3	\$ 450
Increasing Your Financial Intelligence	H5225SP	Self Paced		3 hours		Online	1/4	\$ 60
Innovation in Teams and Organizations (powered by MindEdge)	M1075SP	Self Paced		5 hours		Online	1/2	\$ 79
Introduction to Banking	A1077SP	Self Paced		10 min		Online		\$ 55
Introduction to Business Statistics (powered by MindEdge)	M1222SP	Self Paced		3 hours		Online	1/4	\$ 79
Introduction to Critical Thinking (powered by MindEdge)	M1078SP	Self Paced		7 hours		Online	1/2	\$ 95
Introduction to Data Anlysis (powered by MindEdge)	M1333SP	Self Paced		5 hours		Online	1/4	\$ 79
Introduction to Entrepreneurship (powered by MindEdge)	M1362SP	Self Paced		5 hours		Online	1/4	\$ 129
Introduction to Finance (powered by Mind- Edge)	M1223SP	Self Paced		3 hours		Online	1/4	\$ 79
Introduction to Trust Products & Services	A1079ILO	Instructor Led Online	02/24/2020	5 weeks		Online	1	\$ 300
Introduction to Trust Products & Services	A1079ILO	Instructor Led Online	07/27/2020	5 weeks		Online	1	\$ 300
Leadership and Management for Entrepreneurs (powered by MindEdge)	M1363SP	Self Paced		5 hours		Online	1/4	\$ 129
Legal Foundations in Banking	A1080ILO	Instructor Led Online	03/23/2020	10 weeks		Online	3	\$ 675
Legal Foundations in Banking	A1080GL	Guided Learning	01/00/1900	6 months		Tammy P.	3	\$ 450
Legal Foundations in Banking	A1080ILO	Instructor Led Online	09/14/2020	10 weeks		Online	3	\$ 675

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# Courses: Business Skills

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
Legal Foundations in Banking	A1080WC	Webcourse	4/2/2020 for 8 weeks 6-8:00pm	8 weeks		Nancy H.	3	\$ 450
Making the Client Call Suite	A1081SP	Self Paced		20 min		Online		\$ 55
Managing Funding, Liquidity and Capital	A1082ILO	Instructor Led Online	01/27/2020	6 weeks		Online	3	\$ 875
Managing Funding, Liquidity and Capital	A1082ILO	Instructor Led Online	06/08/2020	6 weeks		Online	3	\$ 875
Managing Interest Rate Risk	A1083ILO	Instructor Led Online	04/13/2020	8 weeks		Online	3	\$ 875
Managing Interest Rate Risk	A1083ILO	Instructor Led Online	11/02/2020	8 weeks		Online	3	\$ 875
Managing the Bank's Investment Portfolio	A1084ILO	Instructor Led Online	03/23/2020	5 weeks		Online	3	\$ 875
Managing the Bank's Investment Portfolio	A1084ILO	Instructor Led Online	08/03/2020	5 weeks		Online	3	\$ 875
Managing Your Time at Work	H1350SP	Self Paced		3 hours		Online	1/4	\$ 60
Marketing	C7740GL	Guided Learning		6 months		Andrew L.	3	\$ 450
Marketing in a Digital World Bundle	A1085BSP	Self Paced		7.5 hours		Online		\$ 599
Marketing in a Digital World: Build Your Campaign	A1086SP	Self Paced		45 min		Online		\$ 129
Marketing in a Digital World: Digital Campaigns	A1087SP	Self Paced		3.5 hours		Online		\$ 299
Marketing in a Digital World: Find Your Audience	A1088SP	Self Paced		1.5 hours		Online		\$ 129
Marketing in a Digital World: Leveraging LinkedIn	A1089SP	Self Paced		1.5 hours		Online		\$ 129
Marketing in a Digital World: Search Engine Optimization	A1090SP	Self Paced		1 hour		Online		\$ 129
Marketing in a Digital World: Social Campaigns	A1091SP	Self Paced		4 hours		Online		\$ 299
Marketing in a Digital World: Strategic Twitter	A1092SP	Self Paced		1.5 hours		Online		\$ 129
Marketing in a Digital World: The Power of Facebook	A1093SP	Self Paced		1.5 hours		Online		\$ 129
Marketing in Banking	A1094ILO	Instructor Led Online	01/13/2020	4 weeks		Online	1	\$ 300
Marketing in Banking	A1094ILO	Instructor Led Online	06/01/2020	4 weeks		Online	1	\$ 300
Marketing Management	A1095ILO	Instructor Led Online	03/23/2020	4 weeks		Online	1	\$ 300
Marketing Management	A1095ILO	Instructor Led Online	10/26/2020	4 weeks		Online	1	\$ 300
Marketing Planning	A1096ILO	Instructor Led Online	02/17/2020	4 weeks		Online	1	\$ 300
Marketing Planning	A1096ILO	Instructor Led Online	08/17/2020	4 weeks		Online	1	\$ 300
Money and Banking	A1074ILO	Instructor Led Online	02/03/2020	16 weeks		Online	3	\$ 510
Money and Banking	A1074GL	Guided Learning		6 months		Brooke L.	3	\$ 450
Money and Banking	A1074ILO	Instructor Led Online	06/29/2020	16 weeks		Online	3	\$ 510
Money and Banking	A1074ILO	Instructor Led Online	11/02/2020	16 weeks		Online	3	\$ 510

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# Courses: Business Skills

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
Organizational Behavior Certificate	H1100SP	Self Paced		4 months		Online	2	\$ 300
Overcoming Objections Suite	A1100SP	Self Paced		20 min		Online		\$ 55
Payment System Emerging Products	A1301SP	Self Paced		40 min		Online	1/4	\$ 275
Payment System Trends	A1302SP	Self Paced		40 min		Online	1/4	\$ 275
Personal Banker Certificate	A1101SP	Self Paced		13 hours		Online		\$ 795
Poor Safety Deposit Box Drilling Procedures Create Lawsuits	C1444WC	Webcourse	10/6/2020 10:00am - Noon	2 hours		David M.	1/4	\$150 live / \$99 recorded
Principles of Banking	A1370GL	Guided Learning		6 months		Tammy P.	3	\$ 450
Principles of Banking	A1370L	Live	Spring 2020 6:00pm - 8:00pm	8 weeks	Falmouth, Maine	Lise P.	3	\$ 450
Principles of Scrum (powered by MindEdge)	M1226SP	Self Paced		10 hours		Online	1	\$ 299
Productive Work Habits	H1351SP	Self Paced		3 hours		Online	1/4	\$ 60
Professional Communication Certificate: Part 1 Conquering Communication	C1039L	Live	Call to Schedule 8:30am-Noon	1/2 day		Lee Ann S.	1/4	\$ 225
Professional Communication Certificate: Part 2 Creative Decision Making and Problem Solving	C1040L	Live	Call to Schedule 1:00pm-4:00pm	1/2 day		Lee Ann S.	1/4	\$ 225
Professional Communication Certificate: Part 3 Establishing Expectations and Service Standards	C1041L	Live	Call to Schedule 8:30am-Noon	1/2 day		Lee Ann S.	1/4	\$ 225
Professional Communication Certificate: Part 4 Strengthening Interpersonal Relationships and Motivation	C1042L	Live	Call to Schedule 1:00pm-4:00pm	1/2 day		Lee Ann S.	1/4	\$ 225
Professional Communication Certificate: Part 5 Communicate with Confidence, Comfort and Conviction	C1043L	Live	4/22/2020 & 4/29/2020 8:30am- 4:00pm	2 days	New Gloucester, Maine	Lee Ann S.	1/4	\$ 425
Professional in Human Resources (PHR) - Exam Prep Course (powered by MindEdge)	M1220SP	Self Paced		25 hours		Online	1	\$ 349
Quality Service (formerly Customer Service)	C1045WC	Webcourse	3/4/2020 & 3/11/2020 6:00-8:00pm	2 nights		Jessica B.	1/2	\$ 245
Quality Service (formerly Customer Service)	C1045GL	Guided Learning		4 months		Andrew L.	1/2	\$ 245
Referring Insurance and Annuity Clients	A1102SP	Self Paced		1.5 hours		Online		\$ 95
Referring Investment Clients	A1103SP	Self Paced		35 min		Online		\$ 95
Referring Trust Clients	A1104SP	Self Paced		40 min		Online		\$ 95
Relationship Sales Suite	A1105SP	Self Paced		15 min		Online		\$ 55
Relationship Selling to Small Business Customers	A1106SP	Self Paced		1.5 hours		Online		\$ 95
Resilience	H1352SP	Self Paced		3 hours		Online	1/4	\$ 60
Retirement Products for Small Businesses	A1107SP	Self Paced		2 hours		Online		\$ 95
Robbery and Bank Security	A1109SP	Self Paced		45 min		Online		\$ 95

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# Courses: Business Skills

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
Safe Deposit Basics	C1110GL	Guided Learning		4 months		Andrew L.	1/4	\$ 200
Safe Deposit Box Vault Security and Disaster Recovery Essentials	C1445WC	Webcourse	12/16/2020 10:00am - Noon	2 hours		David M.	1/4	\$150 live / \$99 recorded
Safeguarding Bank Assets and the Nation	A1111SP	Self Paced		12 min		Online		\$ 55
Safeguarding the Customer and the Bank	A1127SP	Self Paced		12 min		Online		\$ 55
Servicing and Growing Small Business Relationships	A1112SP	Self Paced		30 min		Online		\$ 95
Small Business Banker Certificate	A1113SP	Self Paced		19 hours		Online		\$ 595
Small Business Basics	A1114SP	Self Paced		20 min		Online		\$ 55
Small Business Marketing (powered by MindEdge)	M1368SP	Self Paced		3 hours		Online	1/4	\$ 79
Small Business Operating and Life Cycles	A1115SP	Self Paced		25 min		Online		\$ 55
Social Media and Digital Security: Emerging Threat Landscape	A1335SP	Self Paced		2 hours		Online	1/4	\$ 95
Social Media at Work: Reap the Rewards and Avoid the Risks	H1353SP	Self Paced		3 hours		Online	1/4	\$ 60
Speak with Confidence (powered by MindEdge)	M1133SP	Self Paced		2 hours		Online	1/4	\$ 40
Starting Your Own Nonprofit Organization (powered by MindEdge)	M1201SP	Self Paced		4 hours		Online	1/4	\$ 79
Statistics	C1117GL	Guided Learning		6 months		Brooke L.	3	\$ 450
Strategic Marketing for Entrepreneurs (powered by MindEdge)	M1364SP	Self Paced		5 hours		Online	1/4	\$ 129
Strategic Planning Fundamentals	H1354SP	Self Paced		3 hours		Online	1/4	\$ 60
Tele-Consulting	A1118SP	Self Paced		1.5 hours		Online		\$ 95
Teller Basics Suite	A1120SP	Self Paced		5 hours		Online		\$ 150
The Business of Listening	H1355SP	Self Paced		3 hours		Online	1/4	\$ 60
Time Value of Money and Risk (powered by MindEdge)	M1224SP	Self Paced		3 hours		Online	1/4	\$ 79
Today's Teller	A1119GL	Guided Learning		6 months		Tammy P.	2	\$ 350
Top 25 Safe Deposit Compliance Issues	C1446WC	Webcourse	3/17/2020 10:00am - Noon	2 hours		David M.	1/4	\$150 live / \$99 recorded
Top 50 Important Safe Deposit Box Operating Procedures	C1447WC	Webcourse	2/13/2020 10:00am - Noon	2 hours		David M.	1/4	\$150 live / \$99 recorded
Understanding and Managing Budgets (powered by MindEdge)	M1225SP	Self Paced		3 hours		Online	1/4	\$ 79
Understanding Banking Products	A1122SP	Self Paced		2.5 hours		Online		\$ 95
Understanding Generational Differences	H1356SP	Self Paced		3 hours		Online	1/4	\$ 60
Universal Banker Certificate	A1123SP	Self Paced		9 hours		Online		\$ 795
Verbal Communication Suite (Telephone Skills)	A1124SP	Self Paced		20 min		Online		\$ 55
Video Conference Etiquette	N1371ILO	Instructor Led Online	Call to Schedule	1 hour		Online	1/4	\$ 55
What Exactly are Payments and Why Do I Need a Payment Strategy?	A1336SP	Self Paced		2 hours		Online	1/4	\$ 235
Why Quality Customer Service Matters Suite	A1125SP	Self Paced		35 min		Online		\$ 95
Why We Struggle with Tough Decisions	H1357SP	Self Paced		3 hours		Online	1/4	\$ 60
Working Together	H1358SP	Self Paced		3 hours		Online	1/4	\$ 60
Written Communication	C1865WC	Webcourse	3/17/2020 for 8 weeks 6:00-8:00pm	8 weeks		Marcia B.	3	\$ 450
Written Communication	C1865GL	Guided Learning		6 months		Susan A.	3	\$ 450
Written Communication Suite (Email)	A1126SP	Self Paced		20 min		Online		\$ 55

# Courses: Compliance

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
<b>Certificate in BSA and AML Compliance Bundle</b>	A2025BSP	Self Paced		7 hours		Online		\$ 1,595
<b>Certificate in Deposit Compliance Bundle</b>	A2026BSP	Self Paced		12 hours		Online		\$ 1,595
<b>Certificate in Lending Compliance Bundle</b>	A6007SP	Self Paced		28 Hours		Online		\$ 2,195
<b>Certificate in Operational Risk Management</b>	A1032SP	Self Paced		10 hours		Online		\$ 1,595
<b>CRCM Exam Online Prep</b>	A2030ILO	Instructor Led Online	8/12/2019	10 weeks		Online		\$ 900
<b>CRCM Exam Online Prep</b>	A2030ILO	Instructor Led Online	11/11/2019	10 weeks		Online		\$ 900
<b>CRCM Exam Online Prep</b>	A2030ILO	Instructor Led Online	3/2/2020	10 weeks		Online		\$ 900
<b>CRCM Exam Online Prep</b>	A2030ILO	Instructor Led Online	8/10/2020	10 weeks		Online		\$ 900
<b>CRCM Exam Online Prep</b>	A2030ILO	Instructor Led Online	11/9/2020	10 weeks		Online		\$ 900
<b>Mortgage Servicing: ARM Notices</b>	A2056SP	Self Paced		30 min		Online		\$ 55
<b>Mortgage Servicing: Early Intervention and Continuity of Contact</b>	A2057SP	Self Paced		30 min		Online		\$ 55
<b>Mortgage Servicing: Error Resolution</b>	A2058SP	Self Paced		40 min		Online		\$ 95
<b>Mortgage Servicing: Escrow Accounts</b>	A2059SP	Self Paced		40 min		Online		\$ 95
<b>Mortgage Servicing: Force-Placed Insurance</b>	A2060SP	Self Paced		40 min		Online		\$ 95
<b>Mortgage Servicing: Loan Origination and Servicing Transfers</b>	A2061SP	Self Paced		45 min		Online		\$ 95
<b>Mortgage Servicing: Loss Mitigation</b>	A2062SP	Self Paced		45 min		Online		\$ 95
<b>Mortgage Servicing: Overview</b>	A2063SP	Self Paced		45 min		Online		\$ 95
<b>Mortgage Servicing: Payment Crediting and Periodic Statements</b>	A2064SP	Self Paced		40 min		Online		\$ 95
<b>Mortgage Servicing: Successors in Interest</b>	A2065SP	Self Paced		45 min		Online		\$ 55
<b>Private Mortgage Insurance</b>	O1225SP	Self Paced		2 hours		Online		\$ 109
<b>Sexual and Workplace Harassment</b>	A2117SP	Self Paced		40 min		Online		\$ 95

Looking for more compliance training or detailed course descriptions?  
 Navigate to [www.cftea.org](http://www.cftea.org) and search under our large catalog of compliance training or contact our CFTEA office for personalized assistance.

# Courses: Leadership, Managerial and Supervisory

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
A Manager's Guide - How to Coach (powered by MindEdge)	M5001SP	Self Paced		3 hours		Online	1/4	\$ 79
A Manager's Guide to Artificial Intelligence (powered by MindEdge)	M5076SP	Self Paced		3 hours		Online	1/4	\$ 99
A Manager's Guide to Blockchain (powered by MindEdge)	M5077SP	Self Paced		3 hours		Online	1/4	\$ 99
A Manager's Guide to Business Ethics in the 21st Century (powered by MindEdge)	M5002SP	Self Paced		10 hours		Online	1/2	\$ 249
A Manager's Guide to Handling Difficult Employee Behavior (powered by MindEdge)	M5004SP	Self Paced		10 hours		Online	1/2	\$ 199
A Manager's Guide to Handling Workplace Conflict (powered by MindEdge)	M5009SP	Self Paced		6 hours		Online	1/2	\$ 99
A Manager's Guide to Information Technology (powered by MindEdge)	M5005SP	Self Paced		10 hours		Online	1/2	\$ 199
A Manager's Guide to Managing People (powered by MindEdge)	M5006SP	Self Paced		5 hours		Online	1/2	\$ 79
A Manager's Guide to Negotiations (powered by MindEdge)	M5063SP	Self Paced		3 hours		Online	1/4	\$ 79
A Manager's Guide to Robotics (powered by MindEdge)	M5078SP	Self Paced		3 hours		Online	1/4	\$ 99
A Manager's Guide to Superior Customer Service (powered by MindEdge)	M5007SP	Self Paced		3 hours		Online	1/4	\$ 79
A Manager's Guide to Time Management (powered by MindEdge)	M5008SP	Self Paced		3 hours		Online	1/4	\$ 79
Active Aggressor for Managers	A5010SP	Self Paced		40 min		Online		\$ 95
Adapting Your Leadership Style	H5201SP	Self Paced		3 hours		Online	1/4	\$ 60
Advanced Professional Development for Supervisors Certificate	H5049SP	Self Paced				Online		\$ 300
Authentic Leadership	A5012SP	Self Paced		15 min		Online		\$ 55
Behavioral Interviewing	H5202SP	Self Paced		3 hours		Online	1/4	\$ 60
Body Language for Leaders (powered by MindEdge)	M5062SP	Self Paced		3 hours		Online	1/4	\$ 79
Body Language for Women in Business (powered by MindEdge)	M5088SP	Self Paced		3 hours		Online	1/2	\$ 79
Building Collaborative Teams	A5014SP	Self Paced		15 min		Online		\$ 55
Certificate in Leadership for Women in Business (powered by MindEdge)	M5087SP	Self Paced		23 hours		Online	1/2	\$ 499
Certified Modern Manager	C5090SP	Self Paced				Online		\$ 899
Certified Modern Supervisor - Maine	C5053L	Live	3/24/2020, 3/31/2020, 4/7/2020 & 4/14/2020 8:30am- 4:30pm	Full Day	New Gloucester, Maine	Alie D.	1	\$ 799
Pineland Conference Center, 16 Pineland Drive, New Gloucester, Maine								
Certified Modern Supervisor - New Hampshire	C5054L	Live	4/9/2020, 4/16/2020, 4/23/2020 & 4/30/2020 8:30am- 4:30pm	Full Day	Gilford, New Hampshire	Lee S.	1	\$ 799
Bank of NH, Gilford, New Hampshire								

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# Courses: Leadership, Managerial and Supervisory

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
Certified Modern Supervisor - Vermont	C5055LV1	Live	Fall 2020 8:30am- 4:30pm	Full Day	Rutland, Vermont	Cynthia Stuart	1	\$ 799
Certified Modern Supervisor - Vermont	C5055LV2	Live	Fall 2020 8:30am- 4:30pm	Full Day	White River Junction, Vermont	Cynthia Stuart	1	\$ 799
Certified Modern Supervisor - Virginia	C5052L	Live	3/2/2020, 3/3/2020, 3/4/2020 & 3/5/2020 8:30am- 4:30pm	Full Day	Hampton, Virginia	Nancy H.	1	\$ 799
Old Point National Bank, 101 E Queen Street, Hampton, Virginia								
Coaching	A5017SP	Self Paced		15 min		Online		\$ 55
Coaching for Development	H5203SP	Self Paced		3 hours		Online	1/4	\$ 60
Coaching to Support the Sales Process Suite	A5018SP	Self Paced		20 min		Online		\$ 55
Communicating Vision	A5019SP	Self Paced		15 min		Online		\$ 55
Communication for Women in Business (powered by MindEdge)	M5089SP	Self Paced		5 hours		Online	1/2	\$ 79
Corrective Action	A5020SP	Self Paced		15 min		Online		\$ 55
Creating Chemistry in Teams	H5204SP	Self Paced		3 hours		Online	1/4	\$ 60
Current Issues Facing Women in Business (powered by MindEdge)	M5090SP	Self Paced		5 hours		Online	1/2	\$ 79
Delegating for Growth	H1347SP	Self Paced		3 hours		Online	1/4	\$ 60
Developing Your Direct Reports	H5205SP	Self Paced		3 hours		Online	1/4	\$ 60
Effective Meetings	A5021SP	Self Paced		15 min		Online		\$ 55
Emotional Intelligence for Managers (powered by MindEdge)	M5022SP	Self Paced		3 hours		Online	1/4	\$ 79
Employee Engagement	H5071SP	Self Paced			4 months	Online	1/4	\$ 60
Employee Recognition	A5023SP	Self Paced		15 min		Online		\$ 55
Employment Law	A5024SP	Self Paced		3 hours		Online		\$ 95
Empowerment	A5025SP	Self Paced		15 min		Online		\$ 55
Enhance Your Potential, Build Your Leadership Narrative Certificate	C5030L	Live	4/16/2020 & 4/23/2020 9:00am - Noon	2 weeks	New Gloucester, Maine	Scott W.	1/2	\$ 325
Pineland Conference Center, 16 Pineland Drive, New Gloucester, Maine								
Finance Essentials for Managers Certificate (powered by MindEdge)	M5061SP	Self Paced			19 hours	Online	1	\$ 399
Foundational Professional Development for Supervisors Certificate	H5048SP	Self Paced				Online		\$ 200
Foundations of Leadership	C5026GL	Guided Learn- ing			4 months	Andrew L.	1/2	\$ 245
Handling Challenging Behaviors in the Workplace	H5206SP	Self Paced		3 hours		Online	1/4	\$ 60
Interviewing	A5027SP	Self Paced		15 min		Online		\$ 55
Introduction to Leadership (powered by MindEdge)	M5028SP	Self Paced		5 hours		Online	1/2	\$ 79
Introduction to Leadership Certificate (powered by MindEdge)	M5015SP	Self Paced			18 hours	Online	1	\$ 199
Leaders and Work-Life Balance (powered by MindEdge)	M5029SP	Self Paced		3 hours		Online	1/4	\$ 79
Leadership and Management for Women in Business (powered by MindEdge)	M5091SP	Self Paced		3 hours		Online	1/2	\$ 79
Leadership Fundamentals	H5207SP	Self Paced		3 hours		Online	1/4	\$ 60

# Courses: Leadership, Managerial and Supervisory

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
Leadership in Action Suite	A5031SP	Self Paced		1.5 hours		Online		\$ 195
Leading and Managing Change (powered by MindEdge)	M5032SP	Self Paced		5 hours		Online	1/2	\$ 79
Leading Others Through Change	H5070SP	Self Paced		4 months		Online	1/4	\$ 60
Leading Superior Project Teams (powered by MindEdge)	M1129SP	Self Paced		1 hour		Online	1/4	\$ 20
Leading Teams (powered by MindEdge)	M5033SP	Self Paced		5 hours		Online	1/2	\$ 79
Leading the Courtney Museum Simulation (powered by MindEdge)	M5074SP	Self Paced		10 hours		Online	1	\$ 399
Leading with Influence	C5034GL	Guided Learning		4 months		Tammy P.	1/2	\$ 245
Learning to Manage	H5208SP	Self Paced		3 hours		Online	1/4	\$ 60
Leveraging the Benefits of a Diverse Workforce	A5035SP	Self Paced		55 min		Online		\$ 95
Management	C5036GL	Guided Learning		6 months		Tammy P.	3	\$ 450
Management Essentials Suite	A5037SP	Self Paced		1.5 hours		Online		\$ 275
Managing in a Modern Organization (powered by MindEdge)	M5045SP	Self Paced		5 hours		Online	1/2	\$ 79
Managing Performance	A5046SP	Self Paced		15 min		Online		\$ 55
Managing Remote Employees	H5210SP	Self Paced		3 hours		Online	1/4	\$ 60
Managing the Work of your Direct Reports	H5209SP	Self Paced		3 hours		Online	1/4	\$ 60
Managing Up	H5211SP	Self Paced		3 hours		Online	1/4	\$ 60
Meetings that Work	H6051SP	Self Paced		3 hours		Online	1/4	\$ 60
Meetings that Work	H5061SP	Self Paced		3 hours		Online	1/4	\$ 60
Meetings that Work	H5061GL	Guided Learning		4 months		Tammy P.	1/2	\$ 245
Mentoring Fundamentals	H5212SP	Self Paced		3 hours		Online	1/4	\$ 60
Millennial Mindset	H5213SP	Self Paced		3 hours		Online	1/4	\$ 60
Motivating Employees To Be Their Best	H5072SP	Self Paced		4 months		Online	1/4	\$ 60
Navigating Difficult Conversations	H5217SP	Self Paced		3 hours		Online	1/4	\$ 60
Negotiation for Women in Business (powered by MindEdge)	M5092SP	Self Paced		3 hours		Online	1/2	\$ 79
Negotiations: Making Business Deals (powered by MindEdge)	M5064SP	Self Paced		4 hours		Online	1/4	\$ 89
Negotiations: Resolving Disputes (powered by MindEdge)	M5065SP	Self Paced		3 hours		Online	1/4	\$ 79
Networking and Mentorship for Women in Business (powered by MindEdge)	M5093SP	Self Paced		3 hours		Online	1/2	\$ 79
Onboarding	H5073SP	Self Paced		4 months		Online	1/4	\$ 60
Ongoing Performance Development	H5218SP	Self Paced		3 hours		Online	1/4	\$ 60
Organizational Trust	H5074SP	Self Paced		4 months		Online	1/4	\$ 60
Project Management for Teams Certificate (powered by MindEdge)	M1033SP	Self Paced		35 hours		Online	2	\$ 845
Project Management Team Leadership Certificate (powered by MindEdge)	M0910SP	Self Paced		18 hours		Online	1	\$ 359

For more information, detailed course descriptions are located at [www.cftea.org](http://www.cftea.org)

# Courses: Leadership, Managerial and Supervisory

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
Servant Leadership	H5219SP	Self Paced		3 hours		Online	1/4	\$ 60
Sexual and Workplace Harassment for Managers	A5050SP	Self Paced		40 min		Online		\$ 95
Statistics as a Managerial Tool (powered by MindEdge)	M5075SP	Self Paced		3 hours		Online	1/4	\$ 79
Supervision	C4310GL	Guided Learning		6 months		Tammy P.	3	\$ 450
Supervisor / Team Leader Certificate	A5051SP	Self Paced		10 hours		Online		\$ 895
Supervisor Communication Skills	H5220SP	Self Paced		3 hours		Online	1/4	\$ 60
Talk Like a Leader	H5221SP	Self Paced		3 hours		Online	1/4	\$ 60
Teaching Adults for Supervisors: Motivate and Engage Learners	T5052SP	Self Paced		2 hours		Online		\$ 295
The Effective Manager's Toolbox Certificate (powered by MindEdge)	M5066SP	Self Paced		15 hours		Online	1	\$ 299
The Manager's Toolbox: Business Nuts and Bolts (powered by MindEdge)	M5067SP	Self Paced		5 hours		Online	1/4	\$ 89
The Manager's Toolbox: Compliance Challenges (powered by MindEdge)	M5068SP	Self Paced		5 hours		Online	1/4	\$ 89
The Manager's Toolbox: Handling Conflict (powered by MindEdge)	M5069SP	Self Paced		5 hours		Online	1/4	\$ 89
The Manager's Toolbox: Morale and Inspiration (powered by MindEdge)	M5070SP	Self Paced		5 hours		Online	1/4	\$ 89
The Manager's Toolbox: New Leader Challenges (powered by MindEdge)	M5071SP	Self Paced		5 hours		Online	1/4	\$ 89
The Manager's Toolbox: New Manager Challenges (powered by MindEdge)	M5073SP	Self Paced		5 hours		Online	1/4	\$ 89
The Manager's Toolbox: Performance Challenges (powered by MindEdge)	M5072SP	Self Paced		5 hours		Online	1/4	\$ 89
Toughest Supervisor Challenges and How to Overcome Them	H5222SP	Self Paced		3 hours		Online	1/4	\$ 60
Transformational Leadership	H4075SP	Self Paced		4 months		Online	1/4	\$ 60
Women and Leadership	H5223SP	Self Paced		3 hours		Online	1/4	\$ 60
Work-Life Balance for Women in Business	M5094SP	Self Paced		3 hours		Online	1/2	\$ 79

# Courses: Learning and Development

Certificate in Online Learning (powered by)	M4001SP	Self Paced		22 hours		Online	1	\$ 499
Micro Learning Focused on Practice and Application	L4002OD	On Demand Recording		1 hour		Diane E.	1/4	\$ 55
Modern Classroom Certified Trainer (MCCT)	L4003OD	Instructor Led Online	Starts 1st of each month	20 hours		Andrew L.	2	\$ 399
Your Role As A Facilitator	C4006L	Live	Call to Schedule 9:00am-Noon	Half Day		Andrew L.	1/4	\$ 200

For more information, detailed course descriptions are located at [www.cftea.org](http://www.cftea.org)

# Courses: Lending

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
Advanced Credit Analysis and Business Finance	C6001L	Live	Call to Schedule 9:00am - 4:00pm	2 Days	New Gloucester, Maine	Vin D.	1/2	\$ 480
Analyzing Financial Statements	A6920ILO	Instructor Led	05/11/2020	16 weeks		Online	3	\$ 550
Analyzing Financial Statements	A6920ILO	Instructor Led	07/27/2020	16 weeks		Online	3	\$ 550
Analyzing Financial Statements	A6920ILO	Instructor Led	12/07/2020	16 weeks		Online	3	\$ 550
Analyzing Financial Statements	A6920GL	Guided Learning		6 months		Susan P.	3	\$ 450
Analyzing Personal Financial Statements and Tax Returns	C6002L	Live	Call to Schedule 9:00am -	Full Day	New Gloucester, Maine	Vin D.	1/2	\$ 325
Analyzing the Tax Returns of Businesses	C6003L	Live	Call to Schedule 9:00am - 4:00pm	Full Day	New Gloucester, Maine	Vin D.	1/2	\$ 325
Appraisal Procedures	A6004SP	Self Paced		1 hour		Online		\$ 95
Basics of Mortgage Processing	A6005SP	Self Paced		45 min		Online		\$ 95
Certificate in Business and Commercial Lend-	A6006SP	Self Paced		33 hours		Online		\$ 600
Commercial Lending	A6350W	Webcourse	1/30/2020 for 8 weeks 6:00-8:00pm	8 weeks		Susan P.	3	\$ 450
Commercial Lending	A6350ILO	Instructor Led	02/10/2020	12 weeks		Online	3	\$ 550
Commercial Lending	A6350ILO	Instructor Led	06/25/2020	12 weeks		Online	3	\$ 550
Commercial Lending	A6350ILO	Instructor Led	10/19/2020	12 weeks		Online	3	\$ 550
Commercial Lending	A6350GL	Guided Learning		6 months		Susan P.	3	\$ 450
Commercial Real Estate Lending Decision	A6008BSP	Self Paced		25 hours		Online		\$ 720
Commercial Real Estate Lending Series 1: Types of CRE Loans, Risk Areas and Performance Drivers	A6009SP	Self Paced		2 hours		Online		\$ 125
Commercial Real Estate Lending Series 2:	A6010SP	Self Paced		3 hours		Online		\$ 125
Commercial Real Estate Lending Series 3: Financing Different Types of Commercial Properties	A6011SP	Self Paced		4 hours		Online		\$ 125
Commercial Real Estate Lending Series 4: Understanding & Evaluating Leases, Appraisals & Environmental Assessments	A6012SP	Self Paced		3 hours		Online		\$ 175
Commercial Real Estate Lending Series 5: Loan Structure and Documentation Considerations	A6013SP	Self Paced		3 hours		Online		\$ 125
Commercial Real Estate Lending Series 6: Construction Lending	A6014SP	Self Paced		6 hours		Online		\$ 175
Completing the HUD-1	A6015SP	Self Paced		30 min		Online		\$ 95
Completing the HUD-1 Elements of Title	A6060SP	Self Paced		1 hour		Online	1/4	\$ 95
Completing the HUD-1 for Loans not covered under TRID	A2121SP	Self Paced		1 hour		Online	1/4	\$ 95
Consumer Credit Basics	A6016SP	Self Paced		20 min		Online	1/4	\$ 55
Consumer Credit Products	A6017SP	Self Paced		1.5 hours		Online	1/4	\$ 95
Consumer Credit Products	C6017GL	Guided Learning		4 months		Tammy P.	1/4	\$ 245



# Courses: Lending

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
Consumer Lending	A7008ILO	Instructor Led Online	03/09/2020	16 Weeks		Online	3	\$ 500
Consumer Lending	A7008WC	Webcourse	4/1/2020 for 8 weeks 6:00- 8:00pm	8 weeks		Lynn A.	3	\$ 450
Consumer Lending	A7008GL	Guided Learning		6 months		Andrew L.	3	\$ 450
Consumer Lending	A7008ILO	Instructor Led Online	07/06/2020	16 Weeks		Online	3	\$ 500
Consumer Lending	A7008ILO	Instructor Led Online	11/02/2020	16 Weeks		Online	3	\$ 500
Consumer Lending Certificate in partnership with eEnsign	O6060SP	Self Paced		21 hours		Online		\$ 550
Consumer Loan Processes	A6018SP	Self Paced		20 min		Online		\$ 55
Credit Products for Small Businesses	A6019SP	Self Paced		40 min		Online		\$ 95
Discovering FHA Programs	A6020SP	Self Paced		1 hour		Online		\$ 95
Elements of Title Insurance	A6021SP	Self Paced		1 hour		Online		\$ 95
Essentials of Mortgage Lending	A6022SP	Self Paced		1.5 hours		Online		\$ 95
Explaining Loan Modifications	A6023SP	Self Paced		1 hour		Online		\$ 95
Fundamentals of Consumer Lending	C6024GL	Guided Learning		4 months		Tammy P.	1/4	\$ 245
Fundamentals of Consumer Lending Suite	A6024SP	Self Paced		40 min		Online		\$ 95
Fundamentals of Credit Analysis and Business Finance	C6025L	Live	Fall 2020 9:00am - 4:00pm	Full Day	New Gloucester, Maine	Vin D.	2	\$ 480
			Pineland Conference Center, 16 Pineland Drive, New Gloucester, Maine					
Fundamentals of Mortgage Lending	A6026ILO	Instructor Led Online	01/13/2020	6 weeks		Online	1	\$ 300
Fundamentals of Mortgage Lending	A6026ILO	Instructor Led Online	06/15/2020	6 weeks		Online	1	\$ 300
Fundamentals of Mortgage Lending	C6026GL	Guided Learning		4 months		Tammy P.	1/4	\$ 245
Fundamentals of Small Business Banking	C6056L	Guided Learning		4 months		Tammy P.	1/4	\$ 245
Fundamentals of Small Business Banking Suite	A1070SP	Self Paced		45 min		Online		\$ 95
Gathering the Facts on Mortgage Fraud	A6027SP	Self Paced		1 hour		Online		\$ 95
Good Faith Estimate and HUD-1	A2049SP	Self Paced		50 min		Online		\$ 55
Handling Mortgage Inquiries and Making Referrals	A6028SP	Self Paced		1.5 hours		Online		\$ 95
Introduction to Agricultural Lending	A6029ILO	Instructor Led Online	01/20/2020	8 weeks		Online	1	\$ 475
Introduction to Agricultural Lending	A6029ILO	Instructor Led Online	07/13/2020	8 weeks		Online	1	\$ 475
Introduction to Analyzing Financial Statements	A1076SP	Self Paced		3.5 hours		Online		\$ 95
Lending as a Cornerstone of Banking	A6030SP	Self Paced		10 min		Online		\$ 55
Lending Decision Process Complete Package	A6031BSP	Self Paced		50 hours		Online		\$ 720
Lending Decision Process Series 1: Industry, Management and Economic Influences	A6032SP	Self Paced		4 hours		Online		\$ 100
Lending Decision Process Series 2: Interpreting Quality of Financial Reports and Accounts	A6033SP	Self Paced		5 hours		Online		\$ 100
Lending Decision Process Series 3: Analyzing the Company's Financial Performance and Condition	A6034SP	Self Paced		12 hours		Online		\$ 200
Lending Decision Process Series 4: The Cash Cycle, Seasonality & Discovering Borrowing Causes & Repayment Sources	A6035SP	Self Paced		8 hours		Online		\$ 150

# Courses: Lending

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
Lending Decision Process Series 5: Analyzing Cash Flow Statements to Measure Long-Term Repayment Ability	A6036SP	Self Paced		6 hours		Online		\$ 150
Lending Decision Process Series 6: Using Financial Projections to Fine Tune the Credit Analysis	A6037SP	Self Paced		6 hours		Online		\$ 150
Loan Collectors Training Program	C6038GL	Guided Learning		4 months		Andrew L.	1	\$ 300
Mortgage Customer Counseling and Prequalification	A6039SP	Self Paced		2.5 hours		Online		\$ 95
Personal Tax Return Analysis	A6041SP	Self Paced		6 hours		Online		\$ 95
Preparing the Closing Disclosure	A6042SP	Self Paced		1 hour		Online		\$ 95
Preparing the Loan Estimate	A6043SP	Self Paced		1 hour		Online		\$ 95
Processing and Underwriting Credit	A6044SP	Self Paced		1 hour		Online		\$ 95
Processing Income and Assets	A6045SP	Self Paced		1 hour		Online		\$ 95
Residential Mortgage Lender Certificate	A6049SP	Self Paced		24 hours		Online		\$ 775
Residential Mortgage Lending	C6050GL	Guided Learning		6 months		Andrew L.	3	\$ 450
Residential Mortgage Lending	C6050WC	Webcourse	1/14/2020 for 8 weeks 6:00-8:00pm	8 weeks		Brandy B.	1/2	\$ 450
Reviewing the Appraisal Report	A6051SP	Self Paced		1 hour		Online		\$ 95
Small Business Borrowing	A6052SP	Self Paced		50 min		Online		\$ 95
Structuring Commercial Loan Packages	C6053L	Live	05/20/2020 9:00am - 4:00pm	Full Day	New Gloucester, Maine	Vin D.	2	\$ 325
			Pineland Conference Center, 16 Pineland Drive, New Gloucester, Maine					
Understanding Business Borrowers	A6055SP	Self Paced				Online		\$ 150

# Courses: Professional Skills and Special Topics

A Question of Workplace Attitude	C5001GL	Guided Learning		4 months		Tammy P.	1/2	\$ 245
Accountability at Work	H2001SP	Self Paced		3 hours		Online	1/4	\$ 60
Ace Your Job Search! (powered by MindEdge)	M5100SP	Self Paced		5 hours		Online	1/4	\$ 79
Advanced Professional Development Certificate	H5039SP	Self Paced				Online		\$ 200
Art of Influencing Others	H5081SP	Self Paced		3 hours		Online	1/4	\$ 60
Balancing Home and Career	C5002GL	Guided Learning		4 months		Tammy P.	1/4	\$ 200
Certificate in Agile Project Management (powered by MindEdge)	M1027SP	Self Paced		17 hours		Online	1	\$ 299
Certificate in Creativity and Innovation (powered by MindEdge)	M5003SP	Self Paced		22 hours		Online	1	\$ 249
Certified Health Savings Professional (Exam Fee Included) - HSA University	S5013ILO	Instructor Led Online	2/27/2020 - 3/26/2020	6 Weeks		Online		\$ 899
Certified Health Savings Professional (Exam Fee Included) - HSA University	S5013ILO	Instructor Led Online	4/30/2020 - 5/28/2020	6 Weeks		Online		\$ 899
Certified Health Savings Professional (Exam Fee Included) - HSA University	S5013ILO	Instructor Led Online	7/9/2020 - 8/6/2020	6 Weeks		Online		\$ 899
Certified Health Savings Professional (Exam Fee Included) - HSA University	S5013ILO	Instructor Led Online	10/1/2020 - 10/29/2020	6 Weeks		Online		\$ 899

# Courses: Professional Skills and Special Topics

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
Certified IRA Specialist I (Exam Fee Included) - IRA University	S5019ILO	Instructor Led Online	2/26/20 - 4/1/2020	5 weeks		Online		\$ 1,199
Certified IRA Specialist I (Exam Fee Included) - IRA University	S5019ILO	Instructor Led Online	4/29/2020 - 6/3/2020	5 weeks		Online		\$ 1,199
Certified IRA Specialist I (Exam Fee Included) - IRA University	S5019ILO	Instructor Led Online	7/8/2020 - 8/12/2020	5 weeks		Online		\$ 1,199
Certified IRA Specialist I (Exam Fee Included) - IRA University	S5019ILO	Instructor Led Online	9/30/2020 - 11/4/2020	5 weeks		Online		\$ 1,199
Certified IRA Specialist II (Exam Fee Included)	S0923ILO	Instructor Led Online	Coming Fall 2020			Online		
Challenging Negative Attitudes	H5082SP	Self Paced		3 hours		Online	1/4	\$ 60
Dealing Effectively with Co-Workers	A5005SP	Self Paced		3 hours		Online		\$ 95
Dealing with Stress	C5007GL	Guided Learning		4 months		Tammy P.	1/2	\$ 245
Developing as a Professional	C5008GL	Guided Learning		4 months		Tammy P.	1/2	\$ 245
Emotional Intelligence	H5010SP	Self Paced				Online	1/4	\$ 60
Emotional Intelligence	H5010GL	Guided Learning		4 months		Andrew L.	1/2	\$ 245
Essential Professional Development Certificate	H5037SP	Self Paced				Online		\$ 200
Essential Professional Development Certificate	H5038GL	Guided Learning		6 months		Tammy P.		\$ 200
Essentials of Project Management	H5085SP	Self Paced		4 hours		Online	1/4	\$ 60
Essentials of Workplace Conduct	A5011SP	Self Paced		40 min		Online		\$ 95
Essentials of Workplace Conduct	C5011GL	Guided Learning		4 months		Tammy P.	1/2	\$ 245
Essentials of Workplace Conduct	C5011SP	Self Paced		3 hours		Online	1/2	\$ 60
Finding Purpose In Your Career (powered by MindEdge)	M5101SP	Self Paced		3 hours		Online	1/4	\$ 49
Foundational Professional Development Certificate	C0919	Self Paced				Online		\$ 250
Goals and Goal Setting	C5012GL	Guided Learning		4 months		Tammy P.	1/2	\$ 245
HSA Fundamentals	S5013LV	Live	03/12/2020 8:30-1:00pm	Half Day	Montpelier, Vermont	Matthew C.	1/4	\$ 295
			Comfort Inn Suites at Maplewood, 213 Paine Turnpike N., Montpelier, Vermont					
HSA Fundamentals	S5013LM	Live	04/02/2020 8:30-1:00pm	Half Day	New Gloucester, Maine	Matthew C.	1/4	\$ 295
			Pineland Conference Center, 16 Pineland Drive, New Gloucester, Maine					
Improving Productivity	A5014SP	Self Paced		3 hours		Online		\$ 95
IRA Essentials On Demand	S5018SP	Self Paced		30 Days		Online		\$ 249
IRA Fundamentals	S5017M	Live	2/5/2020 & 2/12/2020 6:00pm- 8:30pm	2 nights	Machias, Maine	Wendy S.		\$ 295
			Machias Savings Bank, 4 Center Street, Machias, Maine					
IRA Fundamentals	S5017LV	Live	03/10/2020 8:30am- 4:00pm	Full Day	Montpelier, Vermont	Matthew C.	1/2	\$ 295
			Comfort Inn Suites at Maplewood, 213 Paine Turnpike N., Montpelier, Vermont					
IRA Fundamentals	S5017LM	Live	03/11/2020 8:30am- 4:00pm	Full Day	Augusta, Maine	Betsy M.	1/2	\$ 295
			TBA, Augusta, Maine					

# Courses: Professional Skills and Special Topics

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
IRA Fundamentals	S5017LV2	Live	03/11/2020 8:30am- 4:00pm	Full Day	Rutland, Vermont	Cynthia S.	1/2	\$ 295
			TBA, Rutland, Vermont					
IRA Fundamentals	S5017LM3	Live	3/18/2020 & 3/25/2020 5:30pm- 7:30pm	Full Day	Rockport, Maine	Betsy M.	1/2	\$ 295
			Camden National Bank, Hanley Center, 245 Commercial Street, Rockport, Maine (Back Building)					
IRA Fundamentals	S5017LM2	Live	03/31/2020 8:30am- 4:00pm	Full Day	New Gloucester, Maine	Matthew C.	1/2	\$ 295
			Pineland Conference Center, 16 Pineland Drive, New Gloucester, Maine					
IRA, Advanced	S5016LV	Live	03/11/2020 8:30am- 3:00pm	Full Day	Barre, Vermont	Matthew C.	1/2	\$ 295
			Comfort Inn Suites at Maplewood, 213 Paine Turnpike N., Montpelier, Vermont					
IRA, Advanced	S5016LM	Live	04/01/2020 8:30am- 3:00pm	Full Day	New Gloucester, Maine	Matthew C.	1/2	\$ 295
			Pineland Conference Center, 16 Pineland Drive, New Gloucester, Maine					
IRAs, Introduction to	A5015SP	Self Paced		30 min		Online		\$ 95
Leveraging LinkedIn	C5099OD	On Demand	Coming Soon	1 hour		Andrew L.	1/4	\$0
Managing Change	A5044SP	Self Paced		15 min		Online		\$ 55
Managing Change	C5044GL	Guided Learning		4 months		Tammy P.	1/4	\$ 200
Managing Time at Work	A5022SP	Self Paced		15 min		Online		\$ 95
Managing Your Time	A5023GL	Guided Learning		4 months		Tammy P.	1/2	\$ 245
Medallion Programs and Signature Guarantees: An Overview of the Processes, Rules & Risks	C5024L	Live	Call to Schedule 9:00-Noon	Half Day		Alfred P.	1/4	\$ 185
Medallion Programs and Signature Guarantees: An Overview of the Processes, Rules & Risks	C5024L	Live	2/5/2020 1:30pm-3:30pm	Half Day	Montpelier, Vermont	Alfred P.	1/4	\$ 185
			Comfort Inn Suites at Maplewood, 213 Paine Turnpike N., Montpelier, Vermont					
Medallion Programs and Signature Guarantees: An Overview of the Processes, Rules & Risks	C5024L	Live	Call All 1:00pm - 4:00pm	Half Day		Alfred P.	1/4	\$ 185
Networking for Success (powered by Mind-Edge)	M5102SP	Self Paced		3 hours		Online	1/4	\$ 49
Notary Public Workshop	C5025L	Live	Call to Schedule 9:00am - Noon	3 hours		Alfred P.	1/4	\$ 215
Notary Public Workshop	C5025L	Live	2/5/2020 9:00am - Noon	3 hours	Montpelier, Vermont	Alfred P.	1/4	\$ 215
			Comfort Inn Suites at Maplewood, 213 Paine Turnpike N., Montpelier, Vermont					
Online Communication Suite (Social Media)	A5026SP	Self Paced		10 min		Online		\$ 55

# Courses: Professional Skills and Special Topics

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
Personal Branding (powered by MindEdge)	M5027SP	Self Paced		3 hours		Online	1/4	\$ 49
Personal Creativity (powered by MindEdge)	M5028SP	Self Paced		5 hours		Online	1/2	\$ 79
Personal Finance (powered by MindEdge)	M5029SP	Self Paced		3 hours		Online	1/4	\$ 49
Presentation Skills Suite	A5030SP	Self Paced		50 min		Online		\$ 95
Sales Essentials 1: Understanding the Sales Cycle	H5040GL	Guided Learning		4 months		Tammy P.	1/4	\$ 60
Sales Essentials 2: Prospecting and Territory Management	H5041GL	Guided Learning		4 months		Tammy P.	1/4	\$ 60
Sales Essentials 3: Open the Sales Call	H5042GL	Guided Learning		4 months		Tammy P.	1/4	\$ 60
Sales Essentials 4: What to Ask, How to Listen	H5043GL	Guided Learning		4 months		Tammy P.	1/4	\$ 60
Sales Essentials 5: Presenting, Overcoming and Closing	H5044GL	Guided Learning		4 months		Tammy P.	1/4	\$ 60
Sales Essentials 6: Developing Clients for Life	H5045GL	Guided Learning		4 months		Tammy P.	1/4	\$ 60
Sales Essentials Certificate	H5046SP	Self Paced				Online		\$ 200
Sales Essentials Package Certificate	H5046BGL	Guided Learning		4 months		Tammy P.	1.5	\$ 245
Sales Management	C5049GL	Guided Learning		4 months		Tammy P.	1/2	\$ 245
Sales Planning Suite	A5050SP	Self Paced		20 min		Online		\$ 55
Selling in a Social World (Bundle)	A5053BSP	Self Paced		1.7 hours		Online		\$ 129
Selling in a Social World: Engage Your Audience	A5054SP	Self Paced		45 min		Online		\$ 49
Selling in a Social World: Extend Your Reach	A5055SP	Self Paced		1 hour		Online		\$ 89
Successful Sales Campaigns	A5056SP	Self Paced		2 hours		Online		\$ 95
Supercharge Your Personal Creativity (powered by MindEdge)	M5060SP	Self Paced		1 hour		Online	1/4	\$ 20
Taking Initiative	H5086SP	Self Paced		4 hours		Online	1/4	\$ 60
Team Excellence	H5083SP	Self Paced				Online	1/4	\$ 60
The Business of Listening	C5063GL	Guided Learning		4 months		Tammy P.	1/2	\$ 245
The First 30 Days (powered by MindEdge)	M5103SP	Self Paced		3 hours		Online	1/4	\$ 49
Winning at Human Relations	C5057GL	Guided Learning		4 months		Tammy P.	1/2	\$ 245
Working Effectively with Co-Workers	H5005SP	Self Paced				Online	1/4	\$ 60
Working Effectively with Co-Workers	H5005GL	Guided Learning		4 months		Tammy P.	1/4	\$ 200
Working in Teams	C5058GL	Guided Learning		4 months		Tammy P.	1/2	\$ 245
Working Together	C5059GL	Guided Learning		4 months		Tammy P.	1/2	\$ 245

# Courses: Technology and Business Software

Course	Code	Format	Date(s) / Time	Duration	Location	Instructor	Credits/ PDU	Cost
Access Control and Identity Management Scenarios (powered by MindEdge)	M9019SP	Self Paced		5 hours		Online	1/2	\$ 79
Certificate in Cybersecurity (powered by MindEdge)	M9016SP	Self Paced		40 hours		Online	3	\$ 499
Cybersecurity Fundamentals	A9001SP	Self Paced		30 min		Online		\$ 55
Cybersecurity Management	A9002SP	Self Paced		1 hour		Online		\$ 275
Excel Power Hour: Analyzing Data with Pivot Tables	N9003ILO	Instructor Led Online	Choose Your Date	1 hour		Online	1/4	\$ 55
Excel Power Hour: Auditing and Protecting Workbooks	N9004ILO	Instructor Led Online	Choose Your Date	1 hour		Online	1/4	\$ 55
Excel Power Hour: Calculating and Analyzing Data with Excel IF Statements	N9005ILO	Instructor Led Online	Choose Your Date	1 hour		Online	1/4	\$ 55
Excel Power Hour: Connecting Worksheets and Workbooks	N9006ILO	Instructor Led Online	Choose Your Date	1 hour		Online	1/4	\$ 55
Excel Power Hour: Creating Easy to Read Spreadsheets	N9007ILO	Instructor Led Online	Choose Your Date	1 hour		Online	1/4	\$ 55
Excel Power Hour: Creating Interactive Reports with Pivot Charts	N9008ILO	Instructor Led Online	Choose Your Date	1 hour		Online	1/4	\$ 55
Excel Power Hour: Discovering and Presenting Trends Data with Charts	N9009ILO	Instructor Led Online	Choose Your Date	1 hour		Online	1/4	\$ 55
Excel Power Hour: Ensuring Data Integrity	N9010ILO	Instructor Led Online	Choose Your Date	1 hour		Online	1/4	\$ 55
Excel Power Hour: PivotTables Beyond the Basics	N9011ILO	Instructor Led Online	Choose Your Date	1 hour		Online	1/4	\$ 55
Excel Power Hour: Using PivotTables to Present Interactive Data	N9012ILO	Instructor Led Online	Choose Your Date	1 hour		Online	1/4	\$ 55
Excel: Advanced Skills (powered by MindEdge)	M9032SP	Self Paced		3 hours		Online	1/4	\$ 79
Excel: Basics (powered by MindEdge)	M9031SP	Self Paced		3 hours		Online	1/4	\$ 79
Excel: Tips & Tricks (powered by MindEdge)	M9033SP	Self Paced		3 hours		Online	1/4	\$ 79
Information Security and Red Flags	A9013SP	Self Paced		45 min		Online		\$ 95
Introduction to Cybersecurity (powered by MindEdge)	M9022SP	Self Paced		5 hours		Online	1/4	\$ 99
Keeping Your Social Media Accounts Secure! (powered by MindEdge)	M9015SP	Self Paced		1 hour		Online	1/4	\$ 20
Operational Security Scenarios (powered by MindEdge)	M9018SP	Self Paced		5 hours		Online	1/2	\$ 79
Outlook Power Hour: Keeping Your Mailbox Clean	N9021ILO	Instructor Led Online	Choose Your Date	1 hour		Online	1/4	\$ 55
Outlook Power Hour: Using the Calendar and Time Management Tools	N9034ILO	Instructor Led Online	Choose Your Date	1 hour		Online	1/4	\$ 55
PowerPoint Power Hour: Creating Dynamic Presentations Using Excel Data	N9020ILO	Instructor Led Online	Choose Your Date	1 hour		Online	1/4	\$ 55
Project Management for Information Technology Certificate (powered by MindEdge)	M9017SP	Self Paced		25 hours		Online	1	\$ 499
Real-World Cloud Cybersecurity Scenarios (powered by MindEdge)	M9033SP	Self Paced		25 hours		Online	2	\$ 329
Real-World Cybersecurity Scenarios	M9034SP	Self Paced		30 hours		Online	2	\$ 399
Security Awareness Training (powered by MindEdge)	M9014SP	Self Paced		2 hours		Online	1/4	\$ 15

Don't see what you are looking for? Contact our office and we can help!

## Withdrawal Policy

Withdrawal from a course is required in writing to the CFTEA office. A student may withdraw from a class with no fees assessed up to ten business days prior to the start of the class. Within the ten business days, refunds will deduct a \$25.00 cancellation fee, cost of materials and postage/handling. No shows at the start of class receive no refund. To avoid a cancellation fee, the course may be transferred to another student for \$50 prior to the start date.

Additional cancellation charges:

Instructor Led Online 8-16 week or  
daytime seminars/classes. \$130 Cancellation Charge

Instructor Led Online  
short classes.....\$ 75 Cancellation Charge

ABA Self-paced , Ascensus, MindEdge, OnCourse  
classes.....No refunds

Any student who registers for a class, does not inform the CFTEA office of withdrawal and does not attend the class will be charged the full tuition rate.

## Cancellation Due to Bad Weather

Winter weather can be volatile and unpredictable. Because of this CFTEA will expect payment for any enrollment cancellation due to anticipated bad weather after the deadline requirements in the Withdrawal Policy. At the discretion of CFTEA, with the exception of classes held at a high school, college or university, should bad weather become a deterrent for any student(s) to attend a class on the day/evening of the program, there will be no charge for the enrollment. The decision to cancel any evening class will be made by 2:00 PM. Daytime classes will be cancelled by 3:00 PM the day before the class. The CFTEA office will contact a student enrolled in a cancelled class.

NOTE: Classes being held at a high school, college or university will be canceled when the school makes the decision to close for bad weather. Please listen to radio stations in your area that would have information about school closings for inclement weather.

## CFTEA Smoking Policy

A smoke-free environment is maintained at all CFTEA classes, seminars and workshops, and social events. In most cases, smoking areas are available at class and seminar locations. Your instructors will be aware of the smoking areas.

## Class Attendance Policy

Student attendance and class participation are in many classes critical to the learning objectives of the class. CFTEA has established the following policy regarding student absences.

- More than one absence in any class longer than three sessions, and any absence in a class of three or fewer sessions may jeopardize the student's receipt of credit for the class.
- Instructors may waive these policies with adequate and documented reasons and after discussions with the CFTEA office.

## CFTEA In-House Cancellation Policy

CFTEA appreciates being a preferred educational partner and provides work setting up In-House live programs for the benefit of organizations. At times changes or situations may occur that impact a course running. It is important to communicate with the CFTEA office if there is any change that impacts an agreed upon course to run. If a course cannot be rescheduled, the following cancellation policy is applicable.

Cancelation of the program within:

- 30 days of program date—100% recoupment of program costs.
- 60 days of program date—50% recoupment of program costs.
- 90 days of program date—25% recoupment of program costs.

## CFTEA Code of Ethics and Conduct Policy

The Center for Financial Training and Education Alliance (CFTEA) recognizes that it takes more than quality education and a commitment to the students that it serves to be successful in accomplishing our mission. We rely heavily on our solid reputation for honesty, fairness, and ethical conduct to attract our students, recruit quality instructors, and retain the high level of organizational support and respect.

Our reputation ultimately rests on the good judgment and personal integrity of everyone - staff, volunteer leaders, students, instructors, and all other individuals and organizations - involved with CFTEA.

Those associated with CFTEA in any capacity shall commit themselves to:

- Striving for excellence in all aspects of CFTEA;
- Using only legal and ethical means in all CFTEA activities, including conducting all financial transactions in a responsible manner;
- Acting with impartiality in all CFTEA matters;
- Maintaining the confidentiality of privileged information entrusted or known to them by virtue of their association with CFTEA;
- Refusing to engage in, or tolerate, activities for personal gain at the expense of CFTEA or our business partners; and
- Communicating in a truthful and accurate manner.

## Academic Integrity Policy

CFTEA strongly supports the concept of academic integrity and seeks to foster sound moral behavior in its students and faculty. Academic dishonesty can take many forms, including cheating on examinations, plagiarism, aiding others to commit dishonest acts, etc., and must never be tolerated. Students engaging in academic dishonesty are subject to serious consequences. Instructors who observe or suspect an incident of academic dishonesty shall bring it to the attention of an appropriate center official immediately for prompt investigation, review and action.

## Student File Change Policy

Student files are maintained at the CFTEA office. A file is begun for a student when his/her first enrollment form for any class arrives at the CFTEA office. Student records are maintained by the last four digits of the student's social security number. Should you desire not to provide us with this information, we will assign a student identification number to the enrollment listed on the enrollment form.

If a student changes their name or place of employment, please contact the CFTEA office with corrections as soon as possible at 888.366.3242 or [info@cftea.org](mailto:info@cftea.org).

## ACE College Credit Recommendations

The American Council on Education's College Credit Recommendation service (ACE Credit) has evaluated and recommended college credit for several Instructor-Led online classes listed in this catalog and the credit recommendation is listed in the indicated column.

The American Council on Education, the major coordinating body for the nation's higher education institutions, seeks to provide leadership and a unifying voice on key higher education issues and to influence public policy through advocacy, research, and program initiatives. ACE CREDIT connects workplace learning with colleges and universities by helping adults gain access to academic credit at colleges and universities for formal courses and examinations taken in the workplace or other settings outside traditional higher education.

These recommendations do not guarantee you will receive college credit for these classes. The decision is made independently by each college or university. The ACE website lists the Colleges and Universities that have agreed to accept the credit recommendations when appropriate.

Prior to enrolling into a course specifically to transfer the credits to the college or university you are attending please confirm directly with the school that they will accept the credits upon successful completion of the class.



## Grading Policy

In-class: Grade reports will be sent to students as soon as possible after the grades have been received from the instructor. Grade reports to the financial institutions will be sent in bulk at the end of the semester - in January and in July. A student may request in writing that a grade report be sent to his/her human resource department sooner than at the end of the semester if the grade is necessary for a promotion, salary increase, etc.

Online and Self Study: Grades are sent to students upon CFTEA's receipt of the final grade from the instructor or completion of the self-paced programs.

CFTEA uses an official letter grading system for courses eligible for credit, but does not include pluses (+) or minuses (-). Letter grades are as follows:

- 90 - 100 = A (Excellent)
- 80 - 89 = B (Above Average)
- 70 - 79 = C (Average)
- 60 - 69 = D (Below Average)
- Below 60 = F (Failing)
- P = (Passing)
- W = (Withdrawn)
- I = (Incomplete, may be completed and a grade posted.)

A class showing an incomplete grade must be successfully completed within three months of the end date of the class in order for the grade to be changed to a letter grade. Otherwise the incomplete grade will remain as a permanent record on the transcript.

## Transcript Policy

An unofficial transcript of a student's classes may be requested by the student in writing. An official transcript may be sent to a college or other educational facility. There is a \$25.00 fee for an official transcript which must be paid at the time of the request.

When ordering, please include in the request your name, the last four digits of your social security number or your student ID number, your telephone number and the address to which the transcript should be sent, along with the \$25.00 fee payable to CFTEA.

All CFTEA records are maintained under the last four digits of a student's social security number. If this information was not supplied to the CFTEA office during an registration for a course, it may cause any transfer request to be incomplete.

## Transfer Credit Policy

To save students time and added expense, please first contact the CFTEA office at 888.366.3242 or [info@cftea.org](mailto:info@cftea.org) for assistance to complete the appropriate paperwork.

Credit for completed college courses may be transferred to a student's CFTEA transcript. Classes must be completed at an accredited post-secondary institution. The credits must be accompanied by grades of "C" or better in order to be eligible for transfer.

In order to transfer credits from a college to CFTEA, the CFTEA office must be sent an official transcript of the student's credits and grades from the college as well as course descriptions for the classes intended to be transferred. A fee of \$90.00 is assessed for the evaluation of each transfer of credit from different colleges.

## Tuition Policy

Tuition rates for all learning formats may be found on the pages listing the programs.

### In-House Course Tuition:

- 1/4 and 1/2 Credit Classes..... \$60.00
- 1 or 2 Credit Classes..... \$70.00
- 3 Credit Classes..... \$90.00

### Transfers from Vendor Programs (outside enrollment):

- Per course transfer ..... \$15.00

### Transfers from College Programs:

- Per institution transfer ..... \$90.00

## Enrollment Policy

Students may enroll in any CFTEA course by paying at registration or with their approval of their supervisor, learning and development department or Human Resources.

Enrollments not directly paid by a student are billed to an organization throughout the month and are based on the guidelines found in the policies section of this catalog.

## Testing Out Policy

CFTEA will allow students to test out of a Guided Learning course for a \$150 fee. Please direct questions related to testing out to the Executive Director, Andrew Lederer.

## Guided Learning Extension Policy

Extensions are not granted for 1 credit or less classes. Any course not completed within six months will be automatically closed.

Extensions for 3 credit classes allow for one three-month extension with no fee. Any 3 credit class requiring an extension past nine months from the start of the date of the class will be assessed a \$75 extension fee per three-month period up to 18 months past the original start date.

Extensions are granted for 3 credit courses only when course work has been completed.

## Guided Learning Testing Out Extension Policy

One three-month extension will be granted. No testing out enrollment remains open longer than six months.

## Grandfathered Certificate and Diploma Policy

Certificates and diplomas may change at any time based on the needs of the business community. Any student actively worked on a certificate or diploma will be grandfathered for 18 months allowing for the completion of the original certificate and/or diploma.

## Policy of Nondiscrimination

CFTEA reaffirms its standing policy of nondiscrimination in employment and in all programs and activities with respect to race, creed, color, sex, sexual orientation, age, religion, ethnic or national origin, handicap or veteran status.

## Textbook Purchase Policy

Textbooks purchased through the CFTEA office for a live or in-house course will be billed to the organization through the month.

At times additional textbooks are sent to an organization cover late enrollments. Remaining textbooks may be kept by an organization for future classes. Unused textbooks are to be returned to the CFTEA office within 30 days to avoid a charge. Textbooks will be examined for acceptable condition. Any textbooks not in a usable condition will be billed to the organization.

## Parking Policy

CFTEA does not pay for student parking at locations where free parking is not available. In most cases, a student's financial institutions also do not pay for student parking. Please inquire within your financial institution prior to submitting for payment through your organization.

## Payment Policy

CFTEA will invoice organizations for payment or accept payment at time of registration MasterCard, Visa, Discover and American Express credit cards are also accepted.

## Course Descriptions Policy

All updated course descriptions are located on our website at [www.cftea.org](http://www.cftea.org).

# ENROLLMENT FORM

Enroll online at: [www.cftea.org](http://www.cftea.org)

Or complete form, scan to email: [info@cftea.org](mailto:info@cftea.org) or FAX: 207.514.8260

			/
First Name (please print)	M	Last Name	Month/Day of Birth

Work Telephone	Fax Number	Work Email

**Organization Name and Address (P.O. Box and Physical Address):**

**Using a different email address for course communication? Please provide below:**

Testing out of a guided learning course? Course # and Name: \_\_\_\_\_

Course #	Course Title	Location	Date

Students paying their own tuition must pay the full amount at time of enrollment. Visit our website and pay directly for courses and/or textbooks with your credit card.

I approve full payment responsibilities for the selected course(s) and material(s). I confirm that I have read CFTEA withdrawal policies and code of ethics statement and fully understand their meaning. I hereby authorize CFTEA to release my grades to the appropriate representative of my organization. I understand that if I fail to meet the requirements of my organization, I may be held personally responsible for tuition and fees to my organization. If I am a degree student at a school affiliated with CFTEA, I authorize CFTEA to release my transcript and grades to the college I am attending. **\*\*I have read and understand CFTEA's withdrawal policies.\*\*** By registering for courses, I hereby authorize third parties who administer the underlying course(s) to share your course completion , certification and/or exam results with CFTEA.

\_\_\_\_\_  
Student Signature Date



\_\_\_\_\_  
Authorization of Student's Employer



Additional Notes to CFTEA Office: \_\_\_\_\_