



Center for Financial Training and Education Alliance

Trusted

|

Flexible

|

Experienced

|

Innovative

cftea.org

Version: July 2020

# Unlock Your Potential



Spring 2021 Catalog



Develop Career Paths through Certificates, Diplomas and Nationally Recognized Certifications

As we move into 2021, it is important to reflect on the disruptions — personally and professionally that have impacted our students and supporters. 2020 has challenged us to find new ways to navigate our continued professional development.

During these challenging times, our office and board of directors has been hard at work to ensure a positive and relevant experience when working with us.

One of the biggest updates has been the addition of our own learning management system (LMS) with an enhanced experience for students. This new portal is the next step in quality workplace development.

Our board of directors has also received continued training in leadership development and updates have been made to better communicate our mission and vision to support our strategic goals.

While 2020 remains a year of challenge, continued steps have been made to support navigating the future and providing a positive message as we look to reconnect.



Andrew Lederer  
Executive Director  
[andrew@cftea.org](mailto:andrew@cftea.org)  
207.688.6226

## CFTEA: Investing In Your Success

### Mission

The Center for Financial Training and Education Alliance (CFTEA) strives to empower students to achieve their goals, support organizations to realize success and strengthen communities to create positive change by delivering specialized, relevant and affordable educational programs.

CFTEA Is a Local ABA  
Training Provider



### Connect With CFTEA

#### CFTEA Office:

PO Box 365

Springvale, ME 04083

[info@cftea.org](mailto:info@cftea.org) | 1-888-366-3242 | FAX: 207-514-8260



Tammy Perkins  
Member Advocate and  
Enrollment Specialist  
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Emily Young  
Marketing Assistant  
[Emily@cftea.org](mailto:Emily@cftea.org)



West Lebanon, NH—Student Awards Banquet 2019

## Your Trusted Partner in Transforming Organizational Performance

The Center for Financial Training and Education Alliance (CFTEA) provides opportunities to individuals and teams to help organizations unlock business value by optimizing individual, team and organizational performance. With over 98 years as a non-profit in the learning and development field, CFTEA is a partner of choice for business growth, employee recognition and advancement. CFTEA has a reputation for providing high quality programs taught by subject matter 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.

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Would you like to know more? Visit us at [cftea.org](http://cftea.org) or speak with your instructor.  
Follow CFTEA.org on Facebook to hear the latest information and Student Success Stories!

# Learning Formats

Multiple delivery channels allow CFTEA to provide a flexible approach to personal and professional development. Our goal is to leverage technology and content combined with an engaging experience to provide online interaction and learning that equals or exceeds those taught in a live environment.

## Instructor Led Online

Subject matter expert instructors guide learning outcomes and provide key support. An instructor is available to answer questions and provide feedback on assignments. Each week students receive an online assignment. 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 other engagement methods.

## Guided Learning

Find attending live classes difficult due to a busy schedule? For those that are not as comfortable with online training, Guided Learning is a powerful option! Students manage their learning schedule and have a subject matter expert instructor available to assist with material. Class materials are received within two weeks of registration and are provided with an introduction letter, a syllabus and instructions on successfully completing the course.

## Live and In-House

Live and In-House training options provide face-to-face access to the instructor as well as fellow learners. Instruction provides a live channel for discussions. Students attend in-person at a specified location and time.

## 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.

## Seminars

Various seminars are conducted throughout the year. Seminars allow for live, small group discussions on highly specialized topics in business and professional development.

## 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. Access to a device with a microphone and webcam, preferred. 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.

## Webinars

CFTEA's partnership with OnCourse allows access to a large variety of training. This type of training program combines the clarity of a conference call with the interactions and online presentations. With a speakerphone and projector, an entire room of attendees can participate at the same low cost.

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.](#)



*"I definitely see myself taking more classes thru CFTEA depending on where and what department I decide I want to work in in the future."*

# Career Paths

Career paths have been developed for a variety of positions within today's business world. These career paths are suggestions for growth provided to managers, students and human resources a guide on educational goals within a current role or new career. Our career paths have been directly developed by subject matter experts and our education committee.

Research details on our [Career Paths](#), located under Academics on our website.

- |   |  |
|---|--|
| <ul style="list-style-type: none"><li>• Accounting</li><li>• Administrative Assistant</li><li>• Board of Director</li><li>• Business Analysis</li><li>• Call Center / Customer Care</li><li>• Career Development</li><li>• Cash Management / Merchant Services</li><li>• Commercial Lending</li><li>• Commercial Loan Assistant</li><li>• Commercial Loan Underwriting</li><li>• Compliance</li><li>• Consumer Lending</li><li>• Credit Analysis</li><li>• Data Analytics</li><li>• Deposit Operations / Services</li></ul> | <ul style="list-style-type: none"><li>• Digital Banking</li><li>• Entrepreneurship</li><li>• Facilities</li><li>• Human Resources</li><li>• Information Technology</li><li>• Learning and Development</li><li>• Loan Collections</li><li>• Loan Operations / Servicing</li><li>• Marketing</li><li>• Non-Profit Management</li><li>• Residential Mortgage Lender</li><li>• Residential Loan Processing</li><li>• Residential Loan Underwriting</li><li>• Retail Branches</li><li>• Small Business Management</li></ul> |
|---|--|

**Learn more**



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.

In a recent Dale Carnegie survey, companies with engaged employees outperform those without by up to 202%. That's just staggering! A vast 87% of Millennials say that professional development and career growth are significant to them. CFTEA provides suggested educational career paths along with industry and nationally recognized awards to help professionals advance through the mastery of career competencies.

## Advance your banking career while you work.

Earn a Bachelor of Science, Business Administration degree with a Banking major online.

Take your banking career further with this program, developed by Saint Joseph's College (SJC) and the Center for Financial Training and Education Alliance (CFTEA). Our long-standing relationship and close collaboration with the Center provides a program that is highly relevant to the needs of the banking community. With no application fee, four start dates per year, and no live component, Saint Joseph's College is ready and able to provide working adults a way to complete their degree that works for them.

**Already taken courses with CFTEA? You may have already earned credit towards our degree!**

### Required CFTEA courses:

- B1074: Money and Banking
- B1080: Legal Foundations in Banking
- B1370: Principles of Banking
- B1865: Written Communication *and*  
B5465: Verbal Communication, **OR**  
B9121: Business Communication
- B4310: Supervision
- B6050: Residential Mortgage Lending **OR**  
B6047: Real Estate Finance
- B6350: Commercial Lending
- B6920: Analyzing Financial Statements
- B7008: Consumer Lending
- B7740: Marketing for Bankers

### Example of SJC curriculum:

- AC 210: Financial Accounting
- AC 211: Managerial Accounting
- BA 306: Business Ethics
- BA 350: Management Information Systems for Managers
- MG 101: Introduction to Management
- MG 302: Human Resource Management
- MG 309: Organizational Behavior

Saint Joseph's College can accept up to 90 credits in transfer towards this 120 credit degree. If you have completed courses at CFTEA or other DOE accredited-institutions, you are already well on your way to earning your degree with SJC. To learn more about the program and where you stand, please contact our online admissions team by calling 1-800-752-4723, texting 207-893-7841, or emailing [onlineadmissions@sjcme.edu](mailto:onlineadmissions@sjcme.edu).

**We accept applications to this program year-round. Ready to get started on your degree?**  
**Apply now for free at [www.sjcme.edu/apply](http://www.sjcme.edu/apply)**

### Saint Joseph's College

Saint Joseph's was founded in 1912 by the Sisters of Mercy and chartered by the Maine Legislature in 1915. The College, which also administers a traditional four year residential program, is situated on 474 acres along the shore of Sebago Lake in Standish, Maine.

In 1976, Saint Joseph's introduced distance education to serve the needs of busy adult learners who wanted to earn a degree through off-campus study.

### SJC Online Programs

- Affordable tuition and financial aid available to qualified students.
- Administrative and support services are geared towards busy individuals.
- Online courses are available 24/7
- Access to student support, library services, faculty, and technology help desk is available online.
- No application fee; apply online for free at [www.sjcme.edu/apply](http://www.sjcme.edu/apply)

### Saint Joseph's College

278 Whites Bridge Road  
Standish, Maine 04084

**Call:** (800) 752-4723

**Text:** (207) 893-7841

**Email:** [onlineadmissions@sjcme.edu](mailto:onlineadmissions@sjcme.edu)

[www.sjcme.edu/online](http://www.sjcme.edu/online)

## Flexible. Affordable. Accredited.

**With 40 years of experience, we are one of the oldest accredited distance education providers in the United States.** Since 1976, Saint Joseph's College of Maine has been empowering students with industry-relevant and mission-driven degrees they can earn off-campus.

**With our courses offered 100 percent online,** you determine the time and location of completing your coursework. Learn whenever you want, wherever you are!

**You will be assigned a dedicated student support specialist** who will provide guidance on course selection and act as a mentor as you complete your degree. He or she will be your personal advocate and will provide an important link to the faculty, administration, and other college resources.

**You are not alone.** Every student has access to our dynamic learning environment, as well as to our information technology helpdesk. Our online student orientation provides valuable information about our learning management system and the various academic resources available to you.

**Your instructor is only an email away.** One of the unique aspects of Saint Joseph's online programs is the one-on-one relationship you will have with your instructors. As experts in their fields, they are also an excellent source of professional networking.

**Life happens and our flexible schedule is meant to adjust to your needs.** Your support specialist will assist you in selecting each course and an appropriate start date, allowing you to complete your program at a pace that is comfortable and realistic for you.

**We encourage you to visit our campus any time.** Swim at the beach, walk the trails, study at the library and more. Located on the edge of Sebago Lake with all departments on-campus, Saint Joseph's College is a great place to be. We'd love to see you here!



### Request More Information

No matter where you are in your education, or where you are headed, Saint Joseph's College offers an online program that will help you get there.



Online Admissions: 800-752-4723

Visit [sjcme.edu/online](http://sjcme.edu/online)

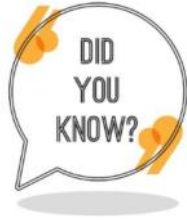
Established in 1912.  
Educating for life.  
Saint Joseph's College  
278 Whites Bridge Road  
Standish, ME 04084

ONLINE PROGRAMS SUMMER 2020

**Ready to get started on your degree? Apply now at [www.sjcme.edu/apply](http://www.sjcme.edu/apply)**

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

Looking to transfer credits  
from CFTEA to a college or  
college courses to CFTEA?



Choose Transcripts and  
Credit Transfers under  
Academics at [www.cftea.org](http://www.cftea.org) to seek  
additional guidance or speak with our  
CFTEA Office to navigate your options.

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)

CFTEA credits may also qualify as an elective toward other degree programs at St. Joseph's College.  
Contact CFTEA for additional guidance and support to complete your degree faster.

## Status and Partnerships



GuideStar is a national foundation that  
rates the health and mission of non-  
profits. CFTEA received GuideStar's  
elite Platinum Seal of Transparency for  
our important work in community workforce and  
career development.



CFTEA's partnership with the Society  
of Human Resource Management  
provides access and key insights  
into the needs of workforce and workplace  
development within our communities.



CFTEA's membership with the  
Maine Association of Non-Profits  
allows us to be part of a network of nonprofits,  
for-profits and individuals who are advancing,  
connecting and strengthening the leadership voice  
and organizational effectiveness of non-profits  
and their unique challenges.

Access our full range of over twenty national learning  
partners for the best in career development!

### We've Got It All

You are the center of our dedicated learning  
community. Our sole purpose is to provide quality,  
personalize assistance and education to help others  
succeed. Questions? We are here to help.





## 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 ACAMS, American Banker's Association, Ascensus, Axelos, Cengage, Hondros Learning, Logical Operations, MindEdge, New Horizons and OnCourse, 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.




# Certificates and Certifications

## Business Skills

Accounting  
Administrative Assistant  
Bank Financial Management  
Bank Solutions Provider  
Banking Customer Service Experience  
Branch Manager  
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  
Foundational Bank Marketing  
Foundations in Banking  
Fraud Prevention  
General Banking  
HR Ethics Series Certificate   
Human Resource Management  
Introduction to Business Analysis  
Non-Profit Management  
Organizational Behavior   
Personal Banker  
Small Business Banker  
Small Business Management  
Trust: Foundational, Intermediate & Advanced  
Universal Banker

## Compliance

AML Foundations Certificate + ACAMS Membership   
BSA and AML Compliance  
Deposit Compliance

## 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*  
Essential Professional Development for Supervisors  
Finance Essentials for Managers  
Introduction to Leadership  
Leadership Narrative  
Leadership for Women in Business   
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  
Commercial Credit  
*Certified Business Credit & Tax Returns Analyst*  
Commercial Loan Assistant & Advanced   
Commercial Loan Underwriting   
Consumer Lending  
Loan Servicing  
Residential Loan Processing  
Residential Loan Underwriting  
Residential Mortgage Lender or Lending  
Small Business Lending & Selling Skills 

## Professional Skills & Special Topics

Advanced Professional Development  
AGILE Project Management  
*Certified Health Savings Professional (CHSP)*  
*Certified IRA Specialist I (CIS I)*

# Certificates & Certifications / Diplomas

## Professional Skills & Special Topics

Creativity and Innovation  
Interpersonal Skills  
Professional Communication Skills  
Foundational Professional Development  
Essential Professional Development  
Sales Essentials

## Technology & Business Software

Cybersecurity  
ITIL 4 Foundation Certificate (AXELOS)  
Project Management for I.T.

## Business Skills Diplomas

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

## Business Skills Diplomas

General Business  
Human Resources  
Marketing  
Universal Banker

## Learning & Development Diplomas

Adult Educators Diploma



## Lending Diplomas

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



## Leadership, Managerial &

## Supervisory Diplomas

Supervision

Ollie says: "Are You Ready?"

Celebrate Your Success at CFTEA 's Virtual Student Awards Banquet in June 2021!

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



# Search Our Full Course Listings

info@cftea.org

1-888-366-3242

CHECKOUT



# CFTEA

ABOUT

COURSES ▾

ACADEMICS ▾

NEWS

CONTACT



## Search All Our Courses

We offer over 600 courses across 7 categories. Use the search box to the right to quickly and easily find what you are looking for. Search by course name, code, instructor, format, or any part of these.

Filter: Format ▾ Reset Showing 1 to 25 of 674 products

Search:

To provide the latest course information, CFTEA now provides instant access and full search capabilities to our website—[cftea.org](https://cftea.org). All courses have links to course descriptions to provide the greatest insight into the length, format, audience and content overview of each of our courses and programs.

This online searching format will be new for many, however the feedback has been overwhelmingly positive. Orders completed through our website also provide automatic tracking for when a student is set up and/or materials are sent.

**Questions?** [Please contact us at the CFTEA office and we are happy to walk anyone through the course search features of our extensive library.](#)

# IRA Courses for 2021

Flexible solutions are available for safe, engaging IRA and HSA training. Gain confidence when interacting on the subject of IRAs and enhance the relationship during these challenging times.



## **Introduction to IRAs - \$95**

A self paced microlearning overview of IRAs and contribution rules.

## **IRA Fundamentals—\$199**

Expand your knowledge beyond that basics. This is the perfect solution that provides reference materials, job aids and video to create an immersive educational experience.

## **IRA Q & A Webcourse - \$199**

You have questions! Our IRA subject matter expert has answers. This engaging experience is an open format that allows students to ask direct questions regarding IRA challenges or situations that they have faced in their career. Submit questions prior to attending or during the course to develop the confidence you need with IRAs.

## **IRA University— \$1,199 (includes certification exam)**

**Starting dates: 2/24/2021, 4/28/2021, 7/7/2021 or 9/29/2021**

Dive deeper! Gain certification and attain a designation that will help you fulfill your career as a professional IRA representative.

## **HSA University— \$899 (includes certification exam)**

**Starting dates: 2/25/2021, 4/29/2021, 7/8/2021 or 9/30/2021**

Dive deeper! Gain Certified Health Savings Professional designation and expand your knowledge within the industry. Help IRA owners receive peace of mind as they work with a professional HSA representative at your institution.

**The 2021 Ascend Conference Portland, Maine starts 9/13/2021—\$1,399**

# Webinars and Webcourses

To allow flexibility and challenges with live courses, two recorded Notary Public courses are now available. One low price of \$295 per course, six month access to the recorded class that can be shared within your organization, instructor handouts/materials, access to ask instructor state specific questions for as many participants as you want for no additional cost. All participants can receive this course on their transcript for no additional fees.



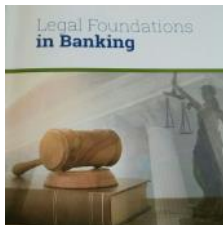
- [Notary Public Workshop](#)

Being a notary public is a responsibility assumed by many financial institution employees. Unfortunately, most do not understand the personal liability when agreeing to serve in this capacity. Notaries and others will learn best practices for dealing with issues unique to the financial industry. Help your team know their responsibilities, plus learn basic laws, liability and reviews of various notarial acts.

## Webcourses

[Coming Fall 2021 — Banking Today, Principles of Banking & Verbal Communication]

Our webcourses combine the personal interaction of a live class with the convenience of attending a class anywhere. Assignments are prepared for class discussion and the instructor will provide interactive guidance for the material.



### Legal Foundations in Banking

A1081WC  
2/11/21 6pm-8 Weeks  
Nancy Hines



### IRA Q & A

S5053WC  
4/7/21 9:00-11:00am  
Betsy Maguire



### Written Communication

C1370WC  
2/23/21 6pm— 8 Weeks  
Marcia Benner



### Modern Supervisor

C5053WC  
4/7/21 9am— 8 Weeks  
Lisa Holt



### Teaching Adults

C5052WC  
3/9/21 9am—2 Days  
Andrew Lederer



### Quality Service

C1045WC  
4/14/21 6pm—2 Nights  
Jessica Bollotta

# Webinars and Webcourses



Have you received an advertisement for an upcoming webinar? Check on our [Webinar](#) page under Academics [or](#) contact our CFTEA office at 888-366-3242. We can quickly get you set up for most webinars to add to your complete transcript—even free ones from New Horizons—at the same low price!

## Unlock Your Career in Banking [Foundations in Banking Certificate](#)



CFTEA makes it easy to access the key to your career in the field of banking. By leveraging high quality materials and flexible options, our [Foundations in Banking Certificate](#) consists of two courses:

- [Your Role as a New Banker](#)
- [Today's Teller](#) or may be substituted with proof of internal teller training at your organization.

This certificate program prepares those aspiring for a successful career in a financial institution with in-demand skills. The targeted courses provides the necessary knowledge and skills for potential employees as well as those new to the financial industry.

It is a direct path to a career in banking and the foundation to build toward the [Certified Modern Banking Representative](#).

# Certified Modern Banking Representative

## Why Certifications Are Important?

Certification programs go beyond training by providing a nationally recognized measurement of knowledge and skills. See our website [cftea.org](http://cftea.org) for details on all our 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. Today's employee wants engagement in different forms. Many employees today have options. They know the labor market is limited and employers are willing to do more than just offer a job. While some compete for better wages, many will stay with a company that offers the ability to develop and grow their career.

## Certified Modern Banking Representative

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.



### Banking Today

Guided Learning	C1011GL
Self Paced Online:	C1011SP
Webcourse:	C1011WC



### Legal Foundations in Banking

Guided Learning	A1080GL
Instructor Led Online	A1080ILO
Webcourse	A1080WC



### Quality Service

Guided Learning	C1045GL
Webcourse	A1045WC



### Fighting Fraud: Top Ten Scams Targeting Our Nations Seniors

Self Paced Online	C1063SP
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When all courses  
are completed, sign  
up with the CFTEA  
office for the exam  
to earn your  
certification!

**FREE**



## Certified Modern Banking Representative

[View Certificate](#)

As a modern certification in today's business world, the Certified Modern Banking Representative (CMBR) covers updated material that allows new, entry-level employees to develop in their careers and equips them to take on modern banking challenges with knowledge, confidence, and skill.

This is an entry-level certification for banking representatives that seeking to advance their career. Certification can offer a clear pathway to employment in the banking industry.

### Included Courses:

- Fighting Fraud
- Banking Today
- Legal Foundations in Banking
- Quality Service
- CMBR Certification Exam



**Self paced  
\$499**

Contact  
[info@cftea.org](mailto:info@cftea.org)  
(207) 688-6225

Powered by  
 **MINEDGE  
LEARNING**

# Certified Modern Branch Professional—Level 1

## Certified Modern Branch Professional—Level 1

This certification is designed for branch employees seeking a true and rich universal banking model and is suited as a career path beyond entry-level through assistant branch manager levels. Retail employees require a full range of skills and knowledge to manage relationships across a broad spectrum of modern topics. *Next level after the Certified Modern Banking Representative.*



### Deposit Accounts and Services

Guided Learning C1048GL



### Handling Workplace Conflict

Guided Learning H1062GL

Self Paced Online H1062SP

Webcourse H1062WC



### IRA Fundamentals Course or equivalent internal IRA course

Instructor Led Online S5019ILO

Self Paced Online S5018SP

Webcourse S5017WC

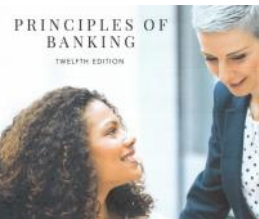


### Legal Foundations in Banking

Guided Learning A1080GL

Instructor Led Online A1080ILO

Webcourse A1080WC



### Principles of Banking

Guided Learning A1370GL

Instructor Led Online A1007ILO

Webcourse A1370WC



### Sales Essentials Certificate

Guided Learning C5046GL

Self Paced Online C5046SP



### Security Awareness Training

Self Paced Online M9014SP

When all courses  
are completed, sign  
up with the CFTEA  
office for the exam  
to earn your  
certification!

# Certified Modern Branch Professional—Level 2

This certification is designed for branch employees seeking a true and rich universal banking model and is suited as a career path beyond entry-level through assistant branch manager levels. Retail employees require a full range of skills and knowledge to manage relationships across a broad spectrum of modern topics. *Prerequisite: Certified Modern Branch Professional—Level 1*



## Fundamentals of Consumer Lending or Consumer Credit Products

Guided Learning C6024GL or C6017GL

Self Paced Online A6017SP



## Fundamentals of Mortgage Lending

Guided Learning C6026GL



## Fundamentals of Small Business Banking

Guided Learning C6056GL

Self Paced Online A1070SP



## Introduction to Leadership

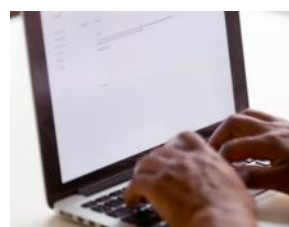
Self Paced Online M5028SP



## Overview of Analyzing Financial Statements or Introduction to Analyzing Financial Statements

Guided Learning C1076GL

Self Paced Online A1076SP



## Written Communication or Certificate in Business Communication

Guided Learning C1865GL

Self Paced Online M1029SP

Webcourse C1865WC

When all courses are completed, sign up with the CFTEA office for the exam to earn your certification!

# Self Paced Professional Courses

Courses are \$60 self paced or on-site live options are available

- Accountability at Work
- Adapting Your Leadership Style
- Art of Influencing Others
- Assertiveness Skills
- Balancing Priorities
- Behavioral Interviewing
- Business Telephone Skills
- Challenging Negative Attitudes
- Coaching for Development
- Creating Chemistry in Teams
- Creative Problem Solving
- Critical Thinking Skills
- Cultural Competency
- Delegating for Growth
- Developing Positive Work Relationships
- Developing Your Direct Reports
- Diversity Awareness
- Effective Listening Skills
- Emotional Intelligence
- Employee Engagement
- Enhance Your Financial Intelligence
- Essentials of Workplace Conduct
- Ethics in the Workplace
- Handling Workplace Conflict
- Handling Challenging Behaviors
- How To Make Yourself Indispensable
- Leadership Fundamentals
- Leading Others Through Change
- Learning to Manage
- Managing Direct Reports
- Managing Remote Employees
- Managing Up
- Meetings That Work
- Mentoring Fundamentals
- Millennial Mindset
- Motivating Employees to Be Their Best
- Navigating Difficult Conversations
- Onboarding
- Ongoing Performance Management
- Organizational Trust
- Productive Work Habits
- Resilience
- Selling Essentials
- Servant Leadership
- Social Media at Work
- Solid Business Writing
- Strategic Planning Fundamentals
- Supervisor Communication Skills
- Taking Initiative
- Talk Like a Leader
- Team Excellence
- Managing Time at Work
- Toughest Supervisor Challenges
- Understanding Generational Differences
- Why We Struggle with Tough Decisions
- Women and Leadership
- Working Effectively with Co-Workers
- Working Together

# Self Paced Professional Development Certificates

Interactive material, case studies, exercises and quizzes developed by CFTEA. Visit our website for more details.



## Foundational Professional Development Certificate —

Course # H5038SP \$350 Develop professional development soft skills as a foundation to advance within your career and workplace.



## Essential Professional Development Certificate—

Course # H5037SP \$200 Develop critical business skills essential for career success in today's workplace.



## Advanced Professional Development Certificate —

Course # H5039SP \$200 Develop a deeper level of critical business skills in today's workplace to meet challenges and be successful.



## Essential Professional Development for Supervisors Certificate —

Course # H5048SP \$200 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 Growing in the role of a supervisor brings new challenges and opportunities. Continue professional development through these interactive courses that keep your skills relevant to modern challenges as a supervisor.



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

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.

New courses and awards have been added to our full catalog to provide rich options for professional and career development.



**Commercial Loan Assistant Certificates / Diploma:** The needs are unique for commercial loan assistants. If you are starting out or would like to deeper your understanding of practical elements of this position, this new certificate and diploma provide excellent options.



**Commercial Lending Underwriting Certificate:** The main goal of this certificate is to provide those in banking with the skills they need to underwrite commercial lending requests and explain their rationale in a succinct credit write-up. Furthermore, it enhances the skills and competencies to acquire, expand and add value to their current and future relationships by discovering cash management and financing opportunities. This practical certificate is recommended for: branch managers, relationship managers, portfolio managers, underwriters, underwriters staff and credit analysts.



### **Adult Educators Diploma**

New ways are required to provide engaged learning for employees. To support a continued career path in Learning and Development and for Subject Matter Experts, this diploma has been created to explore the digital and remote needs needed in today's adult learning process. This certificate is recommended for: anyone that teaches courses or subject matter experts.



### **ITIL 4 Foundation Certificate (AXELOS)**

ITIL is the most widely accepted approach to I.T. service management in the world. Organizations use its proven practices to run their businesses from strategy to daily reality. Millions of I.T. professionals successfully drive their careers thanks to ITIL certification.

New Horizons Computer Learning Centers is proud to be a learning partner with CFTEA. Choose from thousands of technology courses.



**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  
Agile  
Amazon Web Services  
Business Analysis  
Business Skills  
Cisco  
CompTIA  
Database  
DevOps

Google  
Internet of Things (IoT)  
ITIL/Service Management  
Leadership & Development  
Lean Six Sigma  
Microsoft Office  
Microsoft Technical  
Oracle  
Project Management

Power Hours  
Quickbooks  
Enterprise Linux  
Reporting and Analysis  
Scrum  
Security  
VMware  
Web and App Development

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





# 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)**

## 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..... \$70.00
- 2 or 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).

## MANUAL 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

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
First Name (please print)	M	Last Name	Month/Day of Birth
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Work Telephone	Fax Number	Work Email	

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

<input type="text"/>
<input type="text"/>
<input type="text"/>

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

<input type="text"/>
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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: \_\_\_\_\_