



Center for Financial Training and Education Alliance

Trusted

|

Flexible

|

Experienced

|

Innovative

cftea.org

Version: November 30, 2021

Unlock Your Potential



Spring 2022 Catalog



Develop Career Paths through Nationally Recognized Certificates, Diplomas and Certifications

Every day our communities and the world are rapidly changing around us. As a community non-profit, CFTEA has been a long time partner and we value those relationships and the feedback that allows us to be better than yesterday. This allows us to focus on core qualities for aspiring career seekers:

- **Trusted**—Our economy works because people trust each other and the businesses they support. We aim to honor your trust, be consistent, and genuine with every interaction.
- **Flexible** – In life, we want options. At CFTEA, we appreciate that we need to provide flexible learning options—but it is more than that. Our culture supports improving efficiency, providing new leadership opportunities, reducing our environmental impact and leveraging new technology. We actively look to evolve over time and build productive structures leading to success.
- **Innovative**—At our core, we are explorers as we look to improve processes, update course material and stay relevant for today and tomorrow. We are not interested in providing a canned learning approach.



Andrew Lederer
Executive Director
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



CFTEA is guided by a volunteer board of directors interested in giving back to the next generation in the workplace. They are truly impactful career champions!

Connect With CFTEA

CFTEA Office:

PO Box 365

Springvale, ME 04083

info@cftea.org | 1.888.366.3242



Tammy Perkins
Member Advocate and
Enrollment Specialist
Tammy@cftea.org



Security Federal Bank, 2021

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 20 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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Bookmark the [cftea.org News page](https://cftea.org) for the latest information related to course information and career development.



Would you like to know more? Visit us at 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 (See More on Page 16)

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. Students are expected to keep pace with the course syllabus as presented by the instructor.

Guided Learning (See More on Page 15)

If you find attending live classes difficult with your busy schedule and family obligations, 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 your textbook will be mailed to you and your completion window along with access to the new CFTEA Workplace will be emailed to you. On the CFTEA Workplace site, you will find everything you need to complete the course including a suggested syllabus and downloadable versions of the activities you will need to complete. Open book exams will be taken on the CFTEA Workplace and can be taken from any computer. No more waiting on your instructor for corrections or the mail for course exams. With Guided Learning you are free to work at your own pace on your own time.

Live

Live training options provide face-to-face access to the instructor as well as fellow learners at a location near you. Instruction provides a live channel for discussions, experience sharing and networking. Students attend in-person at a specified location and time.

Self-Paced eLearning

Self-Paced eLearning topics provide high flexibility for busy students while balancing a high quality experience. These may include mobile access to learning on the go. 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 based on health and safety conditions. Seminars allow for live, small group discussions on highly specialized topics in business and professional development.

Webcourse (See More on Page 16)

A Webcourse provides a live class experience within a video conferencing environment. This allows a live class experience and engagement with the convenience of attending anywhere with a Internet connection. Access to a device with a webcam and microphone is preferred. With a set date and time, students interact by preparing homework assignments for discussion and ask instructors, as subject matter experts, topical questions.

Webinars

This type of training program combines the clarity of a conference call with the interactions and online presentations. With a video sharing ability, an entire room or organization 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.](#)

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

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.

We accept applications to this program year-round. Ready to get started on your degree?
Apply now for free at 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

Saint Joseph's College

278 Whites Bridge Road
Standish, Maine 04084

Call: (800) 752-4723

Text: (207) 893-7841

Email: onlineadmissions@sjcme.edu

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

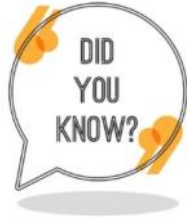
Established in 1912.
Educating for life.
Saint Joseph's College
278 Whites Bridge Road
Standish, ME 04084

ONLINE PROGRAMS SUMMER 2020

Ready to get started on your degree? Apply now at www.sjcme.edu/apply

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 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

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



For students with an Associate's Degree and all of their CFTEA banking transfer credits,
just 30 credits (10 courses) remain (25%) for Bachelor's in Business Administration degree completion

Remaining courses would be drawn from the general education/business core classes.

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 of non-profits. CFTEA
received GuideStar's elite 2021

Platinum Seal of Transparency for our
important work in community workforce, strategic
planning as well as career and board 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 bringing the best together in career development!

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.**



We've Got It All



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 over twenty national education partners allows us to 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 from the best in the nation.

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
AEM/CEM Prep Emergency Management
Agile Certified Practitioner (PMI-ACP) Exam Prep
Asset Management
Bank Financial Management
Bank Solutions Provider
Banking Customer Service Experience
Branch Manager
Branch Manager Bootcamp
Building a Fast Growing Business
Business Communication
Call Center / Customer Care
Cash Management / Merchant Services
Certified Global Business Professional (CGBP) Exam Prep
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
Deposit Operations Fraud Detection
Digital Banker or Banking
Digital Marketing
Emergency Management
Entrepreneurship
Essential Professional Development
Fiduciary Relationship Management
Financial and Credit Risk Management
Foundational Bank Marketing
Foundations in Banking
Front-Line Fraud Detection
Future Proofing Your Career
General Banking
General Business
HR Ethics Series
Human Resource Management
Integrated Wealth Planning and Advice
Introduction to Business Analysis
Non-Profit Management

Business Skills

Organizational Behavior
Personal Banker
Professional in Human Resources(PHR)Exam Prep
Course
Small Business Banker
Small Business Management
Today's Essential Workforce Skills
Today's Workplace
Trust: Foundational, Intermediate & Advanced
Universal Banker

Compliance

BSA and AML Compliance
Deposit Compliance
Financial and Credit Risk Management
Fraud Prevention for BSA Department
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 Team Leaders
and Supervisors

Finance Essentials for Managers
Introduction to Leadership
Leadership for Women in Business
Leadership Narrative
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

Certificates & Certifications / Diplomas

Lending

Commercial Credit
Certified Business Credit & Tax Returns Analyst
Commercial Loan Assistant & Advanced
Commercial Loan Underwriting
Consumer Lending
Loan Collections
Loan Servicing
Residential Loan Processing
Residential Loan Underwriting
Residential Mortgage Fraud Detection
Residential Mortgage Lender or Lending
Residential Mortgage Processing & Underwriting
Fraud Detection
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)
Creativity and Innovation
Core Concepts and Ethics for Fiduciary Advisors
Interpersonal Skills
Foundational Professional Development
Essential Professional Development
Personal Finance
Professional Communication Skills
Sales Essentials

Technology & Business Software

CISCO CNNA Switching Pro
CISCO CCNA Routing Pro
Cybersecurity
ITIL 4 Foundation Certificate (AXELOS)
I.T. Fundamentals Pro
Microsoft Office Pro
PC (A+) Pro
Security (+) Pro
Web Design

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
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 Collections
Loan Servicing
Residential Loan Processing
Residential Loan Underwriting
Residential Mortgage Lending

Leadership, Managerial & Supervisory Diplomas

Supervision

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. 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 2022 and Beyond

Flexible solutions are available for safe, engaging IRA and HSA training. Sign up before the Spring rush. 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 University— \$1,199 (includes certification exam)

Starting dates: 2022 dates will be announced on our website starting December 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: 2022 dates will be announced on our website starting December 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.



Already receiving IRA training within your organization? Leverage the power and transfer internal IRA training toward IRA training requirements at a reduced rate when earning the [Deposit Operations Diploma](#), [Customer Care/Call Center Diploma](#), or [Certified Modern Branch Professional—Level 1](#). [Contact us for details.](#)

Our Guided Learning courses have gotten even better over time!



- Looking for a course with the most flexibility and your own dedicated instructor ?
- Would you like to instant access to an online companion site for course information and assessments with additional paper and postage?
- Would you like to complete a wide range of courses in a safe way?

If so, Guided Learning is an excellent choice! See what it can offer.

More course information is available on our website cftca.org under Courses and choosing Guided Learning in the drop down box or by clicking on the specific course below.

[Accounting, Financial](#)

[*Analyzing Financial Statements*](#)

[Business Math](#)

[*Consumer Lending*](#)

[Fundamentals of Consumer Lending](#)

[Fundamentals of Real Estate Appraisal](#)

[Human Relations](#)

[*Legal Foundations in Banking*](#)

[Management](#)

[*Money and Banking*](#)

[Quality Service](#)

[Statistics](#)

[Today's Teller](#)

[*Written Communication*](#)

[Accounting, General](#)

[Banking Today](#)

[*Commercial Lending*](#)

[Deposit Accounts and Services](#)

[Fundamentals of Mortgage Lending](#)

[Fundamentals of Small Business Banking](#)

[Human Resource Management](#)

[Loan Collectors Training](#)

[*Marketing*](#)

[*Principles of Banking*](#)

[*Residential Mortgage Lending*](#)

[*Supervision*](#)

[Understanding Banking Products](#)

*Italicized courses can be directly applied to the Bachelor's Degree in Business Administration (See pages 7-9)

Webcourses and ILO Principles of Banking

Webcourses

NEW

Our webcourses combine the personal interaction of a live class with the convenience of attending a class anywhere. Click on the course to gain more information from our website or [search our courses at cftea.org](https://www.cftea.org).

CFTEA is excited to announce our first Instructor Led Online (ILO) course Principles of Banking in 2022. While maintaining a weekly schedule, students have the flexibility to complete their work and interact with the class at a time that works for them! This is the first of our Instructor Led Online courses to give the power to our students.



Legal Foundations in Banking (ABA)

A1081WC (*Webcourse*)

Starts 1/26/2022 for 8 weeks

6:00-8:30pm

Nancy Hines



Modern Supervisor Program

C5053WC (*Webcourse*)
March 8, 15, 22, 29,
2022

9:00—11:30 am

Lisa Holt



Principles of Banking (ABA)

A1370ILO (Instructor Led Online)

2/2/2022—5/25/2022 or

9/12/2022—1/2/2023



Your Role as a New Banker

C5024WC (*Webcourse*)

4/6 & 4/13/2022

6:00-8:30pm

Jessica Bollotta



Quality Service

C1045WC (*Webcourse*)

2/8/2022 & 2/15/2022

6:00-8:30pm

Jessica Bollotta



Written Communication

C1865WC (*Webcourse*)

Starts 2/22/2022 for 8 Weeks

6:00-8:30pm

Marcia Benner



Fundamentals of Consumer Lending

C6024WC (*Webcourse*)

5/4 & 5/11/2022

6:00-8:30pm

Amanda Brooks

What people are saying!

"I plan to utilize many of the tools, tips and tricks provided through this course!"

"I found my CFTEA course to be very helpful and eye opening. I feel empowered to ask the right questions and hone my listening skills. So informative! I'm glad I took it."

"I believe my CFTEA course will help me protect and educate my customers, friends and family!"

Announcing New Partner: TestOut



Train. Certify. Succeed.

Advance your Career with Comprehensive Training from TestOut.

NEW

TestOut makes online IT training courseware to empower people to get trained, certified, and career-ready. Over the past 25 years, we've developed a training methodology that suits every learning style and allows maximum engagement and retention. We don't just help you learn—we give you experience. More than just training videos or test prep, our lab simulations include integrated hardware, operating system, and networking labs that let you apply what you've learned in real-world job situations. With TestOut you will have everything you need to get certified. Compare everything that's included, and you'll find a value unmatched in the industry.

Tap into over \$200,000 in simulated network equipment with real-world scenarios.

- [CISCO CCNA Routing Pro Certification](#)
- [CISCO CCNA Switching Pro Certification](#)
- [I.T. Fundamentals Pro Certification](#)
- [Microsoft Office Pro Certification](#)
- [Network Pro Certification](#)
- [PC Pro Certification \(A+\)](#)
- [Security Pro Certification](#)

"Amazing experience all around. Passed my A+ flawlessly, and getting ready for Network+ and Security+. The content is accurate and lab simulator is really amazing." - Allen

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 at no charge.

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 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
(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

Self Paced Online H1062SP



IRA Fundamentals Course or equivalent internal IRA course

Instructor Led Online S5019ILO

Self Paced Online S5018SP

Webcourse S5017WC

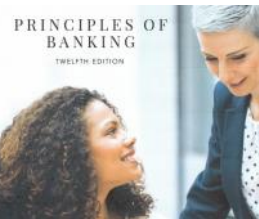


Legal Foundations in Banking

Guided Learning A1080GL

Instructor Led Online A1080ILO

Webcourse A1080WC



Principles of Banking

Guided Learning A1370GL

Webcourse A1370WC

Instructor Led Online A1370ILO



Sales Essentials Certificate

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

Self Paced A6022SP



Fundamentals of Small Business Banking

Guided Learning C6056GL

Self Paced Online A1070SP



Introduction to Leadership

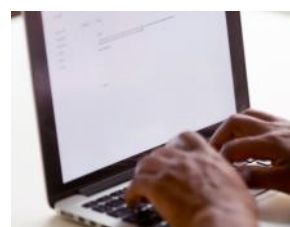
Self Paced Online M5028SP



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 Development Certificates

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



Foundational Professional Development Certificate —

Course # H5038SP \$299 Develop professional development soft skills as a foundation to advance within your career and workplace.



Essential Professional Development Certificate—

Course # H5037SP \$299 Develop critical business skills essential for career success in today's workplace.



Advanced Professional Development Certificate —

Course # H5039SP \$299 Develop a deeper level of critical business skills in today's workplace to meet challenges and be successful.



Essential Professional Development for Team Leaders and Supervisors Certificate —

Course # H5048SP \$299 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 \$399 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 \$299

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.

Introducing

Updated and Highlighted Courses

Feedback to CFTEA is directly taken into consideration for new and updated courses that are needed to meet changing needs and remain relevant. Here are some key courses that are getting rave reviews and engagement. \$99



Consumer Credit Reporting, Credit Bureaus, Credit Scoring and Related Policy Issues:

Think you know credit reporting? This engaging course brings out new information that helps lending personnel and consumers. How do actions impact a credit score? Greater reliance on consumer data significantly affects—and potentially limits—consumer access to financial products or opportunities. This is a course recommended to anyone looking to better understand and navigate credit reporting. **Highly recommended for everyone.**

Applies toward: Residential Loan Underwriting Certificate



Frauds, Scams and Cons

REVISED

Our frauds, scams and cons course was completely overhauled for 2021 with amazing new content, engagement and case studies. The goal of this course is to practically look at how this material can be used to support anyone learning more about current fraud and how it can be used personally and in your career.

Highly recommended for everyone.

Applies toward: Call Center/Customer Care Diploma, Deposit Operations Fraud Detection Certificate, Front-Line Fraud Detection Certificate, Loan Processing Certificate, Loan Servicing Diploma, Residential Mortgage Processing & Underwriting Fraud Detection Certificate,

A Step-by-Step Guide to Repairing Your Credit

FREE



Good credit is critical. Unfortunately, it is pretty easy to hurt your credit score. Something as simple as being late on a loan payment can do serious damage to your score. **The good news is that you can repair your credit and raise your credit score.**

This course provides practical insights, videos and items related to your credit during and after the pandemic.

It is also part of our [Personal Finance Certificate](#).

United Training is proud to be a learning partner with the CFTEA. Choose from thousands of technology courses.



At United Training we help corporate employees and individuals improve their skills. 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.



DiSCOVER A NEW WAY TO ENGAGE AND CONNECT YOUR PEOPLE

Introducing Everything DiSC® on Catalyst™



The Experience Begins with Everything DiSC Workplace® on Catalyst™



CULTURE MATTERS.

Amid the uncertainty and challenges of today, organizational culture cannot be an afterthought. It must be focused on—intentionally and continually—to ensure recovery and results. **So, how do you enhance your workforce's ability to engage, collaborate, and adapt in this volatile and uncertain reality?** It might seem impossible to know where or how to begin—but we can help.



Everything DiSC Workplace® on Catalyst™ takes the best-selling Everything DiSC Workplace® experience to the next level. Designed

to engage everyone in building more effective relationships at work, Workplace on Catalyst helps people adapt to others in real-time, unlocking engagement and inspiring more effective collaboration. **Build a better workplace today.**

By combining DiSC® with instructor-led training and a powerful learning platform. Learners will:

- Discover their DiSC® style
- Deepen understanding of self and others
- Form better relationships with others
- Access real-time tips for more effective interactions with their colleagues
- Build the foundation for an ongoing learning journey

TRANSFORMATIONAL LEARNING. PROVEN IMPACT.



Everything DiSC® on Catalyst™ offers a highly adaptive, human-centered solution that transforms your typical day-long training event into an ongoing development process—that works. The result is a more engaged, collaborative workforce that has an immediate and lasting impact on your organization's performance and culture.



The Everything DiSC Assessment

- Powered and proven by 40+ years of research
- Uses computer-adaptive testing and sophisticated algorithms for precise results that reveal each learner's unique DiSC® style
- Provides the foundation for a personalized learning experience



The Catalyst™ Platform

- Delivers the results of the Everything DiSC assessment in a guided, narrative-style format
- Allows learners to go deeper into their DiSC style and compare with colleagues' styles to develop social and emotional skills
- Provides access to each learner's personalized DiSC application content—including the downloadable Your DiSC Profile report.



The Everything DiSC on Catalyst Facilitation Kit (Optional Kit for Facilitators)

- Brings the learner's DiSC results to life in an instructor-led experience that engages and educates
- Includes Workplace and Agile EQ application content, featuring virtual and in-person training options
- Uses a short-format, modular design that is easily tailored to any group size or time constraint



KEEP YOUR PEOPLE CONNECTED WITH **EVERYTHING DiSC®** **ON CATALYST™**

Do you have people in your organization who are past Everything DiSC® learners? **Ask me about upgrading them to the Everything DiSC Workplace® on Catalyst™ base experience!**

CFTEA
 Center for Financial Training
& Education Alliance
Unlock your potential.

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 with a planned outside instructor engaged, 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.

Policies

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.

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 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

Policies

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.

