

CFTEA



Center for Financial Training and Education Alliance

Trusted



Flexible



Experienced

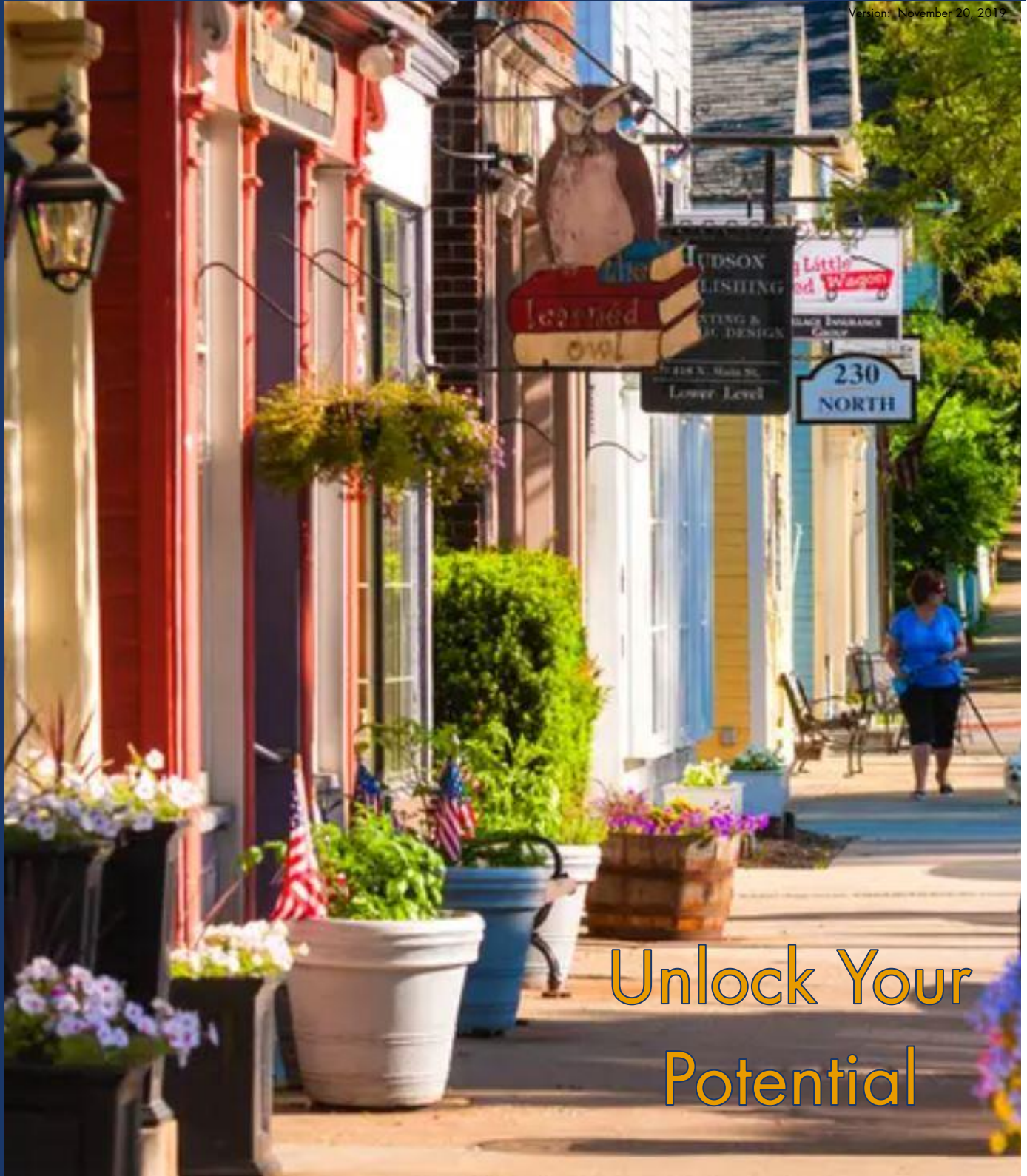


Innovative

cftea.org

Version: November 20, 2019

CFTEA Community Catalog



Unlock Your Potential



Develop Career Paths through Certificates, Diplomas and Nationally Recognized Certifications

Continued education is key to attracting, retaining, and enhancing community businesses in a rapidly changing business world. As a non-profit that works with your local financial institution, affordable and relevant courses have been made available as a community partner.

Our roots began in 1912 and our catalog has expanded to include personal and professional development options open to all in the community. Strong organizations, like yours, are a cornerstone to a stable and thriving community.

While there are a number of training options available, as a non-profit we seek to provide affordable material with a board of directors that come from the community. These are local voices focused on inclusion, innovation, and flexibility. Budget dollars are precious to all businesses and our special relationship with your financial institution now allow you access to our business topics and further strengthen the power of community banks and credit unions to provide greater opportunity and access to critical business skills. How can CFTEA help you? Ask your financial institution or reach out to our office directly for more information.



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CFTEA: Investing In Your Success

Mission

CFTEA strives to empower students to achieve their goals, supports organizations to realize success and strengthens communities to create positive change by delivering specialize, relevant and affordable educational programs.

Vision

CFTEA envisions a world of opportunities for our communities by supporting a vibrant group of professionals that provide relevant and attainable educational options that foster life-long learning in an ever-changing world.

Connect With CFTEA

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York County, Maine Student Awards Banquet (Kennebunk Savings)

Your Trusted Partner in Transforming Organizational Performance

The Center for Financial Training and Education Alliance (CFTEA) trains, guides and provides opportunities to individuals and teams to help organizations unlock business value by optimizing individual, team and organizational performance. With over 99 years in the learning and development field (as part of the original AIB chapters), CFTEA is a partner of choice for business growth, employee recognition and advancement. CFTEA has a reputation for providing high quality programs taught by experts with years of real-world experience. Our various programs, certificates and diplomas can be personalized to address unique client challenges, provide career pathing, reinforce culture and provide the greatest experience for students and organizations while delivering material locally or virtually.

Why Choose CFTEA?

Flexible Solutions

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

Collaborative Approach

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

Trusted Partner

We have been training businesses for more than 110 years. CFTEA is a valued partner that is more than just another training vendor as most of our client relationships span decades.



Certificate, Diploma and Certification Programs

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

Through our alliances with the American Banker’s Association, Ascensus, Cengage, Hondros Learning, Logical Operations, MindEdge Learning, United Training, OnCourse Learning and St. Joseph’s College, 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 / Certifications / Diplomas / Specials

Business Skills

Accounting
Administrative Assistant
Call Center / Customer Care
Data Analytics
Digital Marketing
Diversity & Inclusion Management Bundle
Emergency Management
Entrepreneurship
Essential Online Chat with Customers
Human Resource Ethics Series
Human Resource Management
Introduction to Business Analysis
Instant Messaging in the Workplace
Meeting Minutes that Matter
Non-Profit Management
Optimizing Remote Work
Organizational Behavior
Professional Speaking
Professional Writing
Start Your Own Non-Profit Organization
Working Remotely

Leadership, Managerial & Supervisory

Advanced Professional Development for Supervisors
Certified Modern Manager
Certified Modern Supervisor
Diversity and Inclusion Management Bundle
Finance Essentials for Managers
Introduction to Leadership
Leadership for Women in Business
Managing the Hybrid Workforce Bundle
Professional Development for Supervisors
Project Management for Teams
Project Management Team Leadership
Small Business Management
The Effective Manager's Toolbox

Professional Skills & Special Topics

A Step-by-Step Guide to Repairing Your Credit
Advanced Professional Development
Agile Project Management
Building Financial Literacy
Creativity and Innovation
Essential Professional Development
Interpersonal Skills
Personal Finance
Professional Communication Skills
Foundational Professional Development
Essential Professional Development
Sales Essentials
Today's Essential Workforce Skills Bundle

Technology & Business Software

CISCO CCNA Switching Pro Certification
CISCO CNNA Routing Pro Certification
Cybersecurity
IT Fundamentals Pro Certification (+)
Microsoft Office Pro Certification
PC Pro Certification (A+)
Security Pro Certification (+)
Web Design

Business Skills Diplomas

Accounting
Administrative Assistant
Call Center / Customer Care
General Business
Human Resources
Marketing

Leadership, Managerial & Supervisory Diplomas

Supervision

**DESIGN
YOUR OWN**
Certificates

Certifications

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 detailed information on these nationally recognized certifications.

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

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

- [Modern Supervisor Certification \(MMC 1\)](#)

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

- [Modern Manager Certification \(MMC 2\)](#)

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



Customize your certifications with CFTEA

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

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

More than just another training vendor!

Educational Career Paths

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

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

Contact the CFTEA office to discuss additional educational career paths.

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

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

- Accounting
- Administrative Assistant
- Business
- Career Development
- Data Analytics
- Entrepreneurship
- Facilities
- Human Resources
- Information Technology
- Learning and Development
- Marketing
- Non-Profit [Management](#)
- Personal Enrichment
- Small Business Management

What Is Your Next Step?

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

During the changing workplace, those tasked with HR duties benefit by gaining insights into the latest business trends impacting community organizations. Tap into experts at an easy to accept price point.

[Buzzworthy Benefits \(\\$39\)](#)

Employers are looking for ways to attract and retain top employees. Employees are seeking working conditions that reflect their needs and wants. By offering the right employee benefits, both employers and employees can reach their goals. In this course, you will learn about increasingly popular employee benefits, including paid leave for new parents, student loan assistance programs, and employer-sponsored volunteerism policies.

[Diversity and Inclusion in the Workplace \(\\$39\)](#)

While diversity and inclusion are popular topics in the media and for many progressive organizations, the concepts of diversity and inclusion can be slippery and elusive. What are diversity and inclusion? How are they related to each other? How do you know if your organization is diverse and practices inclusivity? What diversity and inclusion initiatives produce measurable results? In this course, you will examine the concepts of diversity and inclusion and will gain the tools necessary to support an inclusive workplace.

[Employee Classification \(\\$39\)](#)

Successful businesses and organizations rely on workers to perform daily tasks and to keep things running smoothly. Regardless of size, mission, or product, all organizations must determine which roles and responsibilities are necessary to meet business needs. Human resources professionals play a key role in helping organizations assess the number of workers needed, the duties and responsibilities associated with specific roles, and whether or not to hire employees or independent contractors to perform specific tasks. This course provides HR professionals with an overview of different employee classification types, important regulations related to employee classification, and action steps for maintaining compliance.

[Exit Interviews \(\\$49\)](#)

Exit interviews are a powerful tool for organizations to reduce harmful turnover and strengthen their operations, but many organizations fail to use them to their fullest potential. The solution lies in training interviewers to ask the right questions and leaders to recognize the value of exit interview data.

[Flexible Work Arrangements \(\\$39\)](#)

We live in a time where “alternative” work arrangements are becoming more and more the norm. Especially in the wake of the COVID-19 pandemic, companies are exploring new ways of working and are seeing the benefits of greater adaptability as circumstances continue to change and evolve. Both employers and employees can benefit from flexible work arrangements, but offering greater flexibility is not without risk. In this course, you will explore flexible work arrangements, including remote work, flextime, job sharing, compressed workweeks, contracting, gig work, and permanent part-time positions. You will also learn how these flexible work arrangements affect both the business objectives of an organization and the work-life balance of employees.

[Handling Workplace Violence \(\\$39\)](#)

Conflict is inevitable in every workplace environment but can typically be resolved with strong leadership and interpersonal communication skills. However, there are times when conflict escalates to a level that puts a worker’s well-being or safety at risk. Such dangerous conflict can have devastating effects on an organization, dissolving its focus and resources and even causing it to shut down operations completely. This course will explore the causes and signs of violence in the workplace and will provide tips on how to diffuse dangerous behavior and restore a positive, safe workplace environment.

[Hiring and Retaining Diverse Talent \(\\$89\)](#)

Increasing workplace diversity necessitates strategies that foster more inclusive and equitable workplace practices. In this course, you will learn how leaders who want tangible, measurable results from diversity and inclusion initiatives must take an active role in supporting and implementing these strategies. You will explore how to use talent management systems and performance metrics to create a diverse workplace. This course illustrates that providing equal opportunities for continued engagement, including flexible work arrangements, mentorship programs, and employee benefits, is paramount for an organization's diversity and inclusion efforts to succeed.

[Marijuana and the Workplace \(\\$39\)](#)

Medical marijuana is legal in more than half the states and the District of Columbia (D.C.), and the recreational use of marijuana is legal in many. Yet, federal law still identifies marijuana as an illegal drug. In this course, you will learn about the importance of creating and communicating clear workplace policies that address employee drug use. You will also learn to identify signs that an employee might be impaired and how to address those concerns when they come up. You will have the opportunity to explore the legal status of marijuana in your state.

[Pay Equity \(\\$39\)](#)

The Equal Pay Act was passed in 1963, yet a 2020 report by hired.com found that 63 percent of men receive higher salaries than women performing the same job. In this course, you will explore the importance of developing workplace policies that address unfair gaps in employee pay. You will learn about tools that can help inform those policies—like survey and pay audits—and best practices for their implementation. This course presents federal and state legislation on pay equity, and it provides an opportunity for you to explore your state's laws and how they impact your workplace.

[Promoting Employee Well-Being \(\\$39\)](#)

Promoting employee well-being is essential for a healthy organization. While this may seem obvious, it can easily be overlooked in an effort to meet other organizational goals. In this course, you will learn what it means to develop a working environment that prioritizes employee health, happiness, and comfort. You will explore various techniques for creating a positive workplace culture and identify common stressors that may threaten employee well-being. You will also learn about the effects employee well-being has on a company's financial success and productivity.

[Recruiting Multi-Generational Employees \(\\$39\)](#)

Recruiting multi-generational employees is crucial in a world where more individuals are putting off retirement and making later-in-life career changes. While the benefits of a multi-generational workforce may seem obvious, they can easily be overlooked in an effort to meet other organizational goals. In this course, you will learn the differences between current generations that are working together. You will explore various considerations for attracting, recruiting, and retaining an age-diverse workforce. You will also learn how age-diversity can influence a company's success, innovation, and productivity.

[The Future of Work \(\\$39\)](#)

What will the future workspace look like? What are the "typical jobs" of tomorrow? How many hours a week will employees work? How will culture and technology affect the future of work? The answers to these questions are based on events, innovation, employer motivation, and the needs, preferences, and composition of the workforce. This course explores the future of work in the context of COVID-19, automation, artificial intelligence (AI), business sustainability, multi-generational workforces, different business models, increasing demand for flexible work arrangements, an evolving organizational culture, and a need for expanded accessibility.

Instructor Led Online

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

Guided Learning (formerly Assisted Self Study)

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

Live and In-House

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

On Demand

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

Self-Paced eLearning

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

Seminars

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

Webcourse

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

Webinars

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

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

CFTEA powered by MindEdge

Accredited Courses & Certificates

Created by Harvard & M.I.T. Educators

Serving over a million students and improving the way students learn



[Certificate in Professional Writing Skills—Course # M5155SP 23 Hrs \\$379](#)

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

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



[Certificate in Creativity and Innovation—Course # M5003SP 22 Hrs \\$249](#)

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

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



[Starting Your Own Non-Profit—Course # M1201SP 4 Hrs \\$79](#)

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



[Certificate in Entrepreneurship—Course # M1359SP 25 Hrs \\$599](#)

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

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

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[Certificate in Digital Marketing—Course # M1030SP 30 Hrs \\$549](#)

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

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



[Certificate in Finance Essentials—Course # M5061SP 19 Hrs \\$399](#)

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

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



[Certificate in Human Resource Management—Course # M1200SP 21 Hrs \\$399](#)

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

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



[Certificate in Introduction to Leadership—Course # M5013SP 18 Hrs \\$199](#)

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

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

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[Certificate in Non-Profit Management—Course # M1130SP 44 Hrs \\$699](#)

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

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



[Certificate in Cybersecurity—Course # M9015SP 40 Hrs \\$499](#)

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

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



[Certificate in Data Analytics—Course # M1131SP 30 Hrs \\$399](#)

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

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

Plus.

Certificate in Agile Project Management

Certificate in Project Management for Teams

Leadership for Women in Business

Security Awareness

Certificate in Emergency Management

Certificate in Project Management Team Leadership

Small Business Management

Start Your Own Non-Profit Organization

CFTEA Short, Self-Paced eLearning Professional Development Certificates

Interactive case studies, exercises and quizzes developed by CFTEA

[Essential Professional Development Certificate—Course # H5037SP \\$299](#)

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

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

[Advanced Professional Development Certificate —Course # H5039SP \\$299](#)

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

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

[Foundational Professional Development Certificate —Course # H5039SP \\$299](#)

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

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

[Professional Development for Supervisors/Team Lead Certificate—Course # H5048SP \\$299](#)

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

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

[Advanced Professional Development for Supervisors Certificate—Course # H5049SP \\$399](#)

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

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

[Sales Essentials Certificate—Course # H5046SP \\$299](#)

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

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

Live or Self Paced Professional Courses

Courses are \$79 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

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.

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 or 2 Credit Classes..... \$70.00
- 3 Credit Classes..... \$90.00

Transfers from Vendor Programs (outside enrollment):

- Per course transfer \$15.00

Transfers from College Programs:

- Per institution transfer \$90.00

Enrollment Policy

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

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

Testing Out Policy

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

Guided Learning Extension Policy

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

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

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

Guided Learning Testing Out Extension Policy

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

Grandfathered Certificate and Diploma Policy

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

Policy of Nondiscrimination

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

Textbook Purchase Policy

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

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

Parking Policy

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

Payment Policy

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

Course Descriptions Policy

All updated course descriptions are located on our website at www.cftea.org.

CFTEA



Center for Financial Training
& Education Alliance

Unlock your potential.

Search courses online and
easily sign up.

ENROLL NOW!

Application For A		Identification Information	
<input type="checkbox"/> Learner Permit	<input type="checkbox"/> ID Card	<input type="checkbox"/> Renewal	<input type="checkbox"/> Application
Your Information		Driver License?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Full Last Name		Learner Permit?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Full First Name		Non-driver ID Card?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Date of Birth	Gender	This is a form of public record. You should be aware of its release. Some states have laws that allow for the release of this information. You will get a receipt for this application and submit. You will also get a receipt for the release of this information through State records.	
Driver License, Learner Permit, or Non-Driver ID Card number			
Date of Expiration	Type of License	Out of State License <input type="checkbox"/> No	
Total Financial Assets		Contact Details	
High		Home Phone No.	