

# CFTEA



Center for Financial Training & Education Alliance

*Unlock your potential.*

## ABOUT US

Our humble roots began as a volunteer chapter of the American Institute of Banking (AIB) IN 1912 and has grown from there. Our for impact organization is centered on displaying four core values with you at the center.

Trusted  
Flexible  
Passionate  
Innovative

Generations of career champions have discovered what makes CFTEA unique in the learning and development world. Would you like to learn more? [www.cftea.org](http://www.cftea.org)



A Non-Profit Professional Development Community

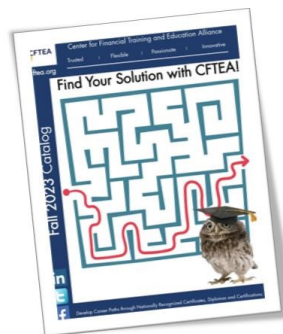
2023 JULY

# CFTEA INSIDER

## WHAT'S INSIDE

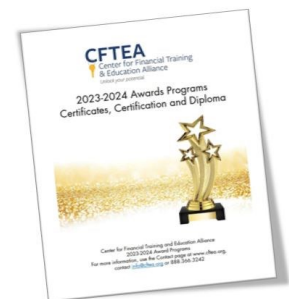
- Why CFTEA Core Values Support You
- 2023 Student Award Programs
- Employee Learning—A Business Priority
- 2023 Leaders Conference
- 2024 Training Conference & Expo
- New Cost Saving Bundles
- Looking Ahead—Special Programs
- Virtual Classroom Flyers September

## EXPLORE OUR UNIQUE SOLUTIONS AND EMPOWERMENT NOW.



2023  
FALL CATALOG

What's new to help you find for your own solution to career development? The new [2023 Fall Catalog](#) is available! Need a physical copy? Download or [Reach out to the CFTEA office and request this updated resource.](#)



2023-2024  
AWARDS CATALOG

What requirements have changed with certificates and diplomas? Looking for worksheets to track your progress? The [2023-2024 Awards Catalog](#) is ready for download!



## WHY CFTEA'S CORE VALUES SUPPORT YOU

Core values represent our heart. They are more than words. They highlight what is important, what we prioritize, and how we look to conduct ourselves with you. Here are some key factors to consider when working with CFTEA over other learning options.

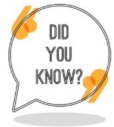
- **Trusted**—Our economy works because people trust each other and the businesses they support. You have options and CFTEA aims to always be believable, relevant, consistent, and genuine in every transaction.
- **Flexible**—In life, we want options. At CFTEA, we appreciate that we need to provide flexible 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. CFTEA looks to evolve over time and build productive structures leading to success.

- **Innovative**—At our core, we are explorers and CFTEA looks to improve processes, update course

material, and stay relevant for today and tomorrow. We never want to say—"But, that is how we have always done it."

- **Passionate**—Supporting the next generation of professionals in the workplace has always been the core of CFTEA's mission. That passion fuels our focus, enables creativity, and enhances our desire to pursue excellence. This is energy lives in our employees, board, council, and instructors.



The CFTEA board and council members spend time each quarter reviewing course materials and seeing what is currently needed in the workplace.



## 2023 STUDENT AWARD PROGRAMS

The celebration of student success continues! Hundreds of employees received recognition for certificates, diplomas, and certifications during the last year. Congratulations to all!

The CFTEA Facebook page continues to highlight community organizations that set a stellar example in being an outstanding employer of choice dedicated to investing in employee development.

Discover all the new award options and updates found in the [2023-2024 Awards Catalog](#) or reach out to the CFTEA office to check your progress toward your educational goals.

## EMPLOYEE LEARNING: A BUSINESS PRIORITY

Aside from company perks and monetary compensation, today's talent is looking for employers that enable them to learn and grow professionally.

A recent LinkedIn report noted the 94% of workers would stay at a company longer if they had more access to employee education and learning opportunities. However, less than 2% of employees actually take advantage of them.

Helping employees remove barriers that allow them to take advantage of these opportunities provide tangible benefits that extend from the personal to the organizational and into the societal level.

Successful organizations view employee education as a strategic investment that's measurable and delivers a return—not a costly perk or benefit.

What percentage of students would recommend the CFTEA learning experience to others? From Course Evals.



“

“Learning new skills is one way we can rewrite the story of our lives.”

”

## UPCOMING: 2023 LEADERS CONFERENCE

Join candid conversations with learning and development professionals as the [2023 Leaders Conference on September 13 & 14 at the North Conway Grand Hotel](#) in New Hampshire.

Continue learning after! All registered attendees are provided access to three solution-focused recorded training programs for learning and development professionals.

Use registration link to see agenda and more!



[Register](#) ▶▶

## UPCOMING: 2024 TRAINING CONFERENCE AND EXPO (ORLANDO, FL) FEBRUARY 26-28



Review budget to attend this learning and development conference that gives attendees the very best in skill-building content, train-the-trainer essentials, eLearning, behavioral analytics, emerging technologies, and more!

CFTEA partners with Training magazine for this event that transcends industry at Disney® Coronado Springs Resort. **Use CFTEA promo cost for an additional \$150 savings and click the find out more button to access details!**

[Find out more](#) ▶

## LOOKING AHEAD: SPECIAL PROGRAMS

### SEPTEMBER 2023

[Principles of Banking Virtual Classroom starts 9/7/2023](#)

[Branch Manager Bootcamp: The Evolving Role of the Branch Manager Virtual Class starts 9/19/2023](#)

[Branch Manager Bootcamp: The Evolving Role of the Branch Manager Virtual Class starts 9/20/2023](#)

[Webinar: Aging in the Workplace: Minimizing Health Care Expenses in Retirement \(Free from Longevity Planning\) 9/21/23](#)

[Consumer Lending Virtual Classroom starts 9/26/2023](#)

[Branch Manager Bootcamp: The Evolving Role of the Branch Manager Virtual Class starts 9/28/2023](#)

## NEW COST-SAVING BUNDLES!



### Essentials of Success Certificate includes

- [Boost Your Confidence Bundle](#)
- [Skills For Your Best Tomorrow Bundle](#)

### Professional Team Leader / Supervisor Certificate includes

- [Succeeding as a Team Leader / Supervisor Bundle](#)
- [Growing as a Team Leader / Supervisor Bundle](#)

### Advanced Professional Team Leader / Supervisor Certificate includes

- [Creating a High Performing Team Bundle](#)
- [Modern Supervisor Certificate](#)
- [Professional Team Leader / Supervisor Certificate](#)

### Modern Workforce Certificate includes

- [Modern Workforce Skills Bundle](#)
- [Modern Workforce Mindset Bundle](#)

### Evolving Professional Certificate includes

- [Career Planning Bundle](#)
- [Unlocking Your Potential as a Professional Bundle](#)





## GET IN TOUCH

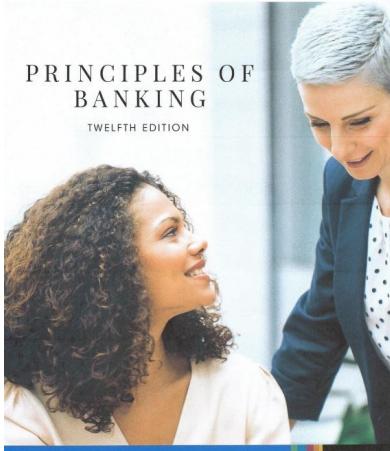
-  [WWW.CFTEA.ORG](http://WWW.CFTEA.ORG)
-  [INFO@CFTEA.ORG](mailto:INFO@CFTEA.ORG)
-  888.366.3242
-  [FACEBOOK.COM/CFTEA.ORG](https://FACEBOOK.COM/CFTEA.ORG)
-  [LINKEDIN.COM/SCHOOL/CFTEA](https://LINKEDIN.COM/SCHOOL/CFTEA)

## WE ARE HERE

We strive 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.



Instructor: Cynthia Stuart.



# PRINCIPLES OF BANKING

## Virtual Classroom

Course #: A1370VC

STARTING SEPTEMBER 7, 2023 FOR 8 WEEKS

3:00 PM—5:00 PM

### course description

The purpose of the Principles of Banking course is to provide participants with the fundamental information they need to understand the business of banking and how the participant, as a bank employee, is a part of the overall business.

#### Objectives:

- Explain the context, structure, and operation of banks as both service providers and profit-making enterprises that rely on employees to provide customer-focused service
- Describe how the evolution of the U.S. banking system has led to the opportunities and responsibilities of banks and bank employees today

### AND MUCH MORE!

Looking for more details, [visit our website](#) for detailed course descriptions.

### how to enroll

Enroll online at our website, [CFTEA.org](https://www.cftea.org) under Business Skills.

### how class works

Course sessions run for 8 consecutive weeks using Zoom with a camera and microphone to replicate a remote live classroom.

#### Principles of Banking applies toward the following:

Certificates: Accounting, Bank Solutions Provider, Bank Teller, Branch Manager, Call Center/Customer Care, Cash Management, Certified Banker, Certified Business Credit Analyst, Certified Modern Branch Professional—Level I, Customer Service Representative, Deposit Operations, Digital Banking, Loan Processing, Loan Servicing, Personal Banker, Residential Mortgage Lending, Sales Manager, Supervisor / Team Leader, Universal Banker

Diplomas: Advanced Financial Services, Bank Marketing, Bank Operations, Business Banking & Commercial Lending, Consumer Lending, Credit Analyst, General Banking, Introduction to Lending, Supervision

### tuition

\$450 per participant for eight weeks of training, assessments, materials and exam.

### withdrawal policy

CFTEA withdrawal policy is outlined within our latest catalog and on our website. Before class begins the enrollment may be transferred to another student with the approval of the student's employer and the CFTEA office.





Instructor: Nancy Hines

# CONSUMER LENDING

Virtual Classroom

Course #: A7008VC

STARTING SEPTEMBER 26, 2023

6:00 PM—8:30 PM (8 SESSIONS)

## course description

Designed for entry-level consumer lenders, consumer credit personnel, and bank employees who need to understand consumer credit. This up-to-date, insider's view of consumer lending offers essential information about the maze of regulations governing credit practices and reviews loan processing, cross-selling, and collections.

After successfully completing this class you should be able to:

- identify components of the consumer installment credit market
- describe various loan products
- trace the lending process
- apply credit math and loan pricing principles
- recognize variables that affect loan structure
- identify opportunities for cross-selling bank products

AND MUCH MORE!

## how to enroll

Looking for more details? [Visit our website](#) for detailed course descriptions. Enroll online at our website, [CFTEA.org](https://www.cftea.org).

## how class works

Course sessions run for 8 consecutive weeks at a live location. Class allows for networking, information sharing and discussion to gain a greater understanding of the material as related to the banking world. Nancy is a long-time Legal Foundations in Banking instructor.

Consumer Lending applies toward the following:

CFTEA Diplomas: Advanced Financial Services, Consumer Lending Diploma, Credit Analyst Diploma, General Banking Diploma, Introduction to Lending Diploma.

Also check out how our [Educational Career Paths](#) can assist you in your current role or the next phase of your career!

**Would you like to know more about  
new educational career paths?**

Visit us at [cftea.org](https://www.cftea.org) and  
follow us on Facebook!