

CFTEA



Center for Financial Training and Education Alliance

Trusted



Flexible



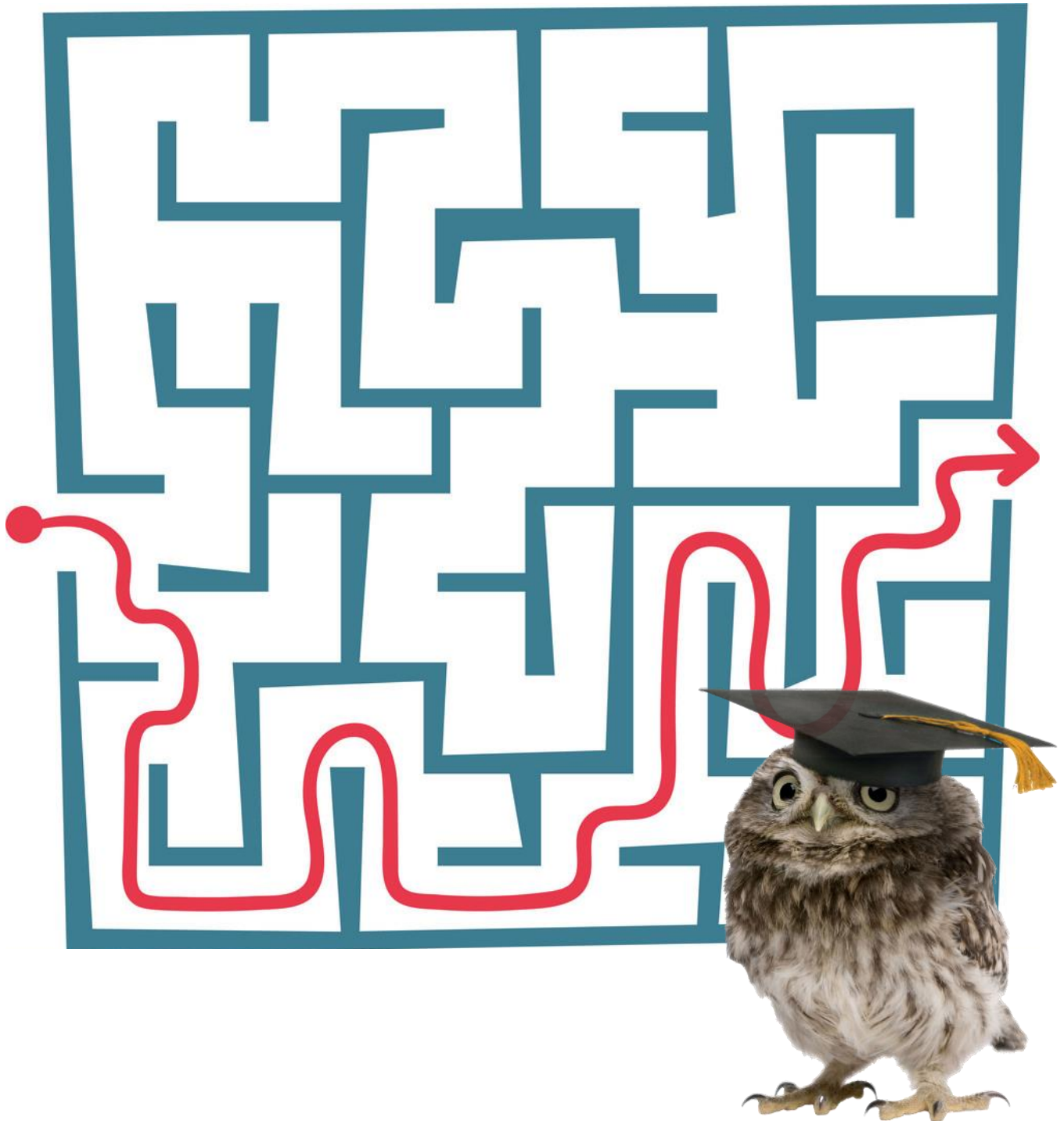
Passionate



Innovative

cftea.org

Find Your Solution with CFTEA!



Fall 2023 Catalog



Develop Career Paths through Nationally Recognized Certificates, Diplomas and Certifications

Why CFTEA? It is a good question. There are many learning and development options within the United States, within your own state, or area. As a non-profit, CFTEA is dedicated to providing affordable training with the best student experience. At no point do we provide canned training options and just move on. Our focus is centered on organizations, their employees, our students, and strengthening our communities.

To do that we work directly with subject matter experts to gain insight and direction into the content of our certificates, diplomas, and the courses that make them up. Trust is at the center of any partnership with our non-profit.

CFTEA has received the 2023 Platinum Transparency designation from



Candid, a national non-profit accountability organization. As new options become available through CFTEA, the goal is clear—remain transparent and retain your trust with career development. We encourage you to discover what our offerings can do for your career and if you haven't worked with us in a while—to rediscover CFTEA!



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,

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

CFTEA Is a Local ABA
Training Provider



Tammy Perkins with CFTEA for
20 years!
Learning Engagement
Specialist
Tammy@cftea.org



Bath Savings 2023

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 25 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 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 as a non-profit for more than 25 years. Our origin started in 1912 – 110 years ago! CFTEA is a valued partner that is more than just another training vendor as most of our client relationships span decades.

TABLE OF CONTENTS

About CFTEA	2
Why Choose CFTEA?	3
Learning Formats	5
Search Full Course Listing at cftea.org	6
Career Paths	7
Certificates, Diplomas and Certifications	8-10
Guided Learning	11
Spotlight: Virtual Classroom	12
Custom In-House	13
Speaking and Writing	14
Team Leader / Supervisor Bundles	15-16
Announcing: Cost-Saving Bundles and Certifications	17-19
2024 Training Conference and Expo	20
Gaining Outside Credit	21
2023-2024 Awards Catalog Updates	21
Audiobooks	22
Foundations in Banking Certificate	22
Course Spotlight: Banking Today	23
Course Spotlight: Principles of Banking	23
Certified Modern Banking Representative	24-25
Certified Modern Branch Professional—Level 1 (Universal Banker)	26
Certified Modern Branch Professional—Level 2 (Universal Banker)	27
Leadership	28
NMLS Exam, Continuing Education Credits, Recertification	29
Community Catalog	29
Bachelor’s Degree, College Transcripts and Credit Transfers	30-32
Policies	33-36
Paper Enrollment Form	37

Bookmark the [cftea.org News page](#) for the latest information related to courses, career development, and the learning community.

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

Instructor Led Online

Subject matter expert instructors guide learning outcomes and provide key support. An instructor is available to answer questions and provide feedback on assignments. Each week students receive an online assignment. The assignments may include reading a chapter in your text, completing an assignment to post on the discussion board, taking a self-check test, or collaborating with other students using discussion boards and other engagement methods. Students are expected to keep pace with the course syllabus as presented by the instructor.

Guided Learning (Courses on Page 10)

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. Would you like the ability to provide live or video conferencing options to employees at just at your organization? Material from live classes can be customized and presented in-house. How does that work? [Ask us and we're happy to give more details.](#)

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/Programs

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.

Virtual Classroom (Courses on Page 11)

A Virtual Classroom 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

If you've found a webinar, CFTEA can usually provide it. Purchasing Webinars through CFTEA directly supports program and course development. This type of training program combines the clarity of a conference call with the interactions and online presentations.

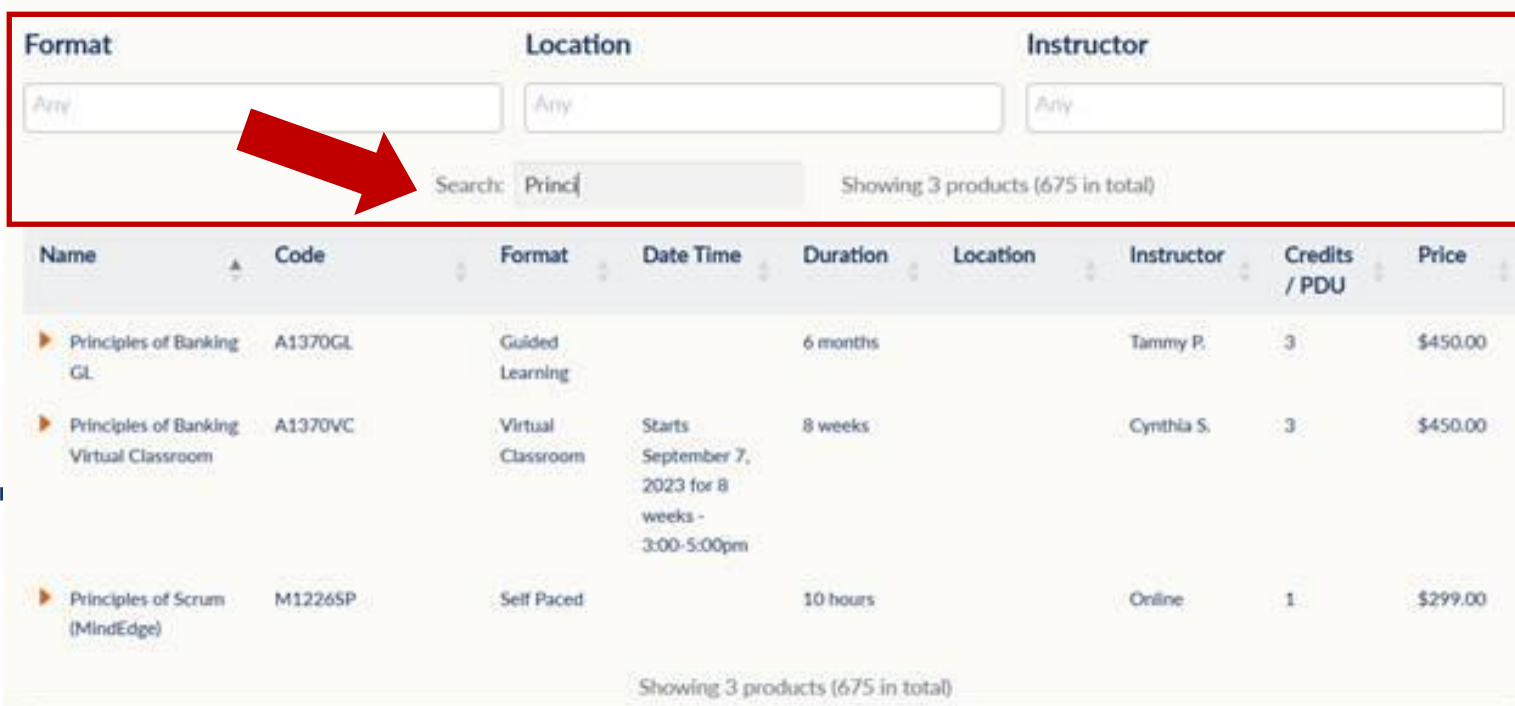
Unable to attend at the scheduled time? Programs are available for playback at a time that convenient for organizations and their employees. [View all of the topics available on our website.](#)

Search Our Full Course Listings

Find over 600 courses easily searchable through the [cftea.org website](https://cftea.org). Discover the power to filter the list by course format, instructor, location, or by typing in a portion of the course name. Tags have been added in 2023 to aid in locating content based on search words.

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.



Format: Location: Instructor:

Search: Showing 3 products (675 in total)

Name	Code	Format	Date Time	Duration	Location	Instructor	Credits / PDU	Price
▶ Principles of Banking GL	A1370GL	Guided Learning		6 months		Tammy P.	3	\$450.00
▶ Principles of Banking Virtual Classroom	A1370VC	Virtual Classroom	Starts September 7, 2023 for 8 weeks - 3:00-5:00pm	8 weeks		Cynthia S.	3	\$450.00
▶ Principles of Scrum (MindEdge)	M1226SP	Self Paced		10 hours		Online	1	\$299.00

Showing 3 products (675 in total)

[Example Above: Searching Principles of Banking]

Want to explore beyond the [career path page](#)? Gain instant access to and full filter and search capabilities to our website—cftea.org. Click on course information to gain course descriptions and more!

[Online Companion Video: [Visual Course Search Demo](#)]

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 provide personalized guidance for our library based on your goals.](#)

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

- 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
- 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

Why Employee Education Is A Business Priority

Aside from company perks and monetary compensation, today's top talent looks for employers that enable them to learn and grow professionally. **A recent LinkedIn report noted that 94 percent of workers would stay at a company longer if they had more access to employee education and learning opportunities.** Less than 2 percent of employees actually take advantage of them.

While employee education is not a new concept, it is clear that it opens doors. These opportunities provide tangible benefits which extend from the personal to the organizational and into the societal level. Employees with access to learning opportunities that develop skills, grow their knowledge, and advance their careers see personal and organizational benefits. **Successful organizations view employee education as a strategic investment that's measurable and delivers a return—not a costly perk or benefit.**



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
Assistant Branch Manager
Bank Financial Management
Bank Solutions Provider
Branch Manager
Branch Manager Bootcamp
Call Center / Customer Care
Cash Management / Merchant Services
Certified Modern Banking Representative
Certified Modern Branch Professional—Level 1
Certified Modern Branch Professional—Level 2
Customer Service Representative
Data Analytics
Deposit Operations
Deposit Operations Fraud Detection
Digital Banker
Digital Marketing
Emergency Management
Entrepreneurship
Essentials of Success
Evolving Professional
Fiduciary Relationship Management
Foundational Bank Marketing
Foundations in Banking
Front-Line Fraud Detection
General Banking
General Business
Human Resource Management
Integrated Wealth Planning and Advice
Introduction to Business Analysis
Modern Workforce
Non-Profit Management
Organizational Behavior
Personal Banker
Professional Speaking
Professional Writing

Business Skills

Professional in Human Resources(PHR) Exam Prep
Sales Essentials
Small Business Banker
Small Business Management
Trust Administration
Universal Banker

Compliance

BSA and AML Compliance
Compliance Essentials
Deposit Compliance
Fiduciary Risk & Compliance Management Skills
Financial and Credit Risk Management
Fraud Prevention for BSA Department
Lending Compliance
Mortgage Lending Compliance
Operational Risk Management
Risk Management Frameworks

Leadership, Managerial & Supervisory

Modern Manager
Modern Supervisor
Finance Essentials for Managers
Introduction to Leadership
Leadership for Women in Business
Professional Team Leader / Supervisor
Advanced Team Leader / Supervisor
Project Management for Teams
Project Management Team Leadership
Wharton Emerging Leaders: Advanced Leadership

Learning and Development

Online Learning
Modern Classroom Certified Trainer (MCCT)

Lending

Business & Commercial Lending
Advanced Commercial Loan Assistant
Commercial Loan Assistant
Commercial Loan Underwriting

Certificates & Certifications / Diplomas

Lending

- Commercial Real Estate Lending Decision Program
- 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

- AGILE Project Management
- Certified Health Savings Professional (CHSP)*
- Certified IRA Specialist I (CIS I)*
- Creativity and Innovation
- Core Concepts and Ethics for Fiduciary Advisors

Technology & Business Software

- Cybersecurity
- ITIL 4 Foundation Certificate (AXELOS)
- ITIL 4 Managing Professional
- ITIL 4 Strategic Leader
- CompTIA A+
- CompTIA Cybersecurity Analyst CySA+
- CompTIA Network+
- CompTIA Security+
- Web Design



Megan Lang

"I'm currently working on completing my **Residential Loan Underwriting Diploma**. I recently started a new job as a loan underwriter and didn't have any underwriting experience. The underwriting courses that CFTEA has to offer have helped make my transition into my new role easier.

The courses helped to get me started in my new role without feeling overwhelmed. CFTEA makes it easy to get signed up for courses and gives you suggestions on career paths that you can take to help towards your goals."

Business Skills Diplomas

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



**DESIGN
YOUR OWN**
Certificates

Find out more about how your organization can mix-and-match to design your own unique certificates.

Guided Learning

Our Guided Learning courses have gotten even better over time!

- Looking for that course format with the most flexibility and your own dedicated instructor?
- Would you like to have instant access to an online companion site for course information and assessments without additional scanning, paper or postage?
- Would you like to complete a wide range of courses that work with your schedule?

If so, Guided Learning is an excellent choice!

Guided Learning Flexible Option for Busy Professionals

Explore the CFTEA library of options that support your career goals at a time that is convenient for you.



cftea.org

[Accounting, Financial](#)

[Analyzing Financial Statements](#)

[Business Math](#)

[Consumer Lending](#)

[Frontline Fundamentals](#)

[Fundamentals of Real Estate Appraisal](#)

[Human Relations](#)

[Legal Foundations in Banking](#)

[Management](#)

[Money and Banking](#)

[Quality Service](#)

[Statistics](#)

[Understanding Banking Products](#)

[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](#)

[Verbal Communication](#)

*Italicized courses can be directly applied to the Bachelor's Degree in Business Administration. Other courses may be accepted toward your degree. (See pages 30-32)

Virtual Classroom Spotlight

Our Virtual Classrooms combine the personal interaction of a live class with the convenience of attending a class anywhere. [View the entire listing on our website](#) or click on the course to gain more information.

[Aging in the Workplace: Minimizing Health Care Expenses in Retirement \(FREE\)](#)

[Branch Manager Bootcamp: The Evolving Role of the Branch Manager](#)

[CompTIA A+](#)

[CompTIA Cybersecurity Analyst+](#)

[CompTIA Network+](#)

[CompTIA Security+](#)

[CompTIA Server+](#)

[Consumer Lending](#)

[ITIL 4 Foundation](#)

[ITIL 4 Specialist: Creative, Deliver, Support](#)

[ITIL 4 Specialist: Drive Stakeholder Value](#)

[ITIL 4 Specialist: High Velocity IT](#)

[ITIL 4 Strategic Leader: Digital IT Strategy](#)

[ITIL 4 Strategist: Direct, Plan, and Improve](#)

[Outside Calling School](#)

[Principles of Banking](#)

[Virtual Delivery for Educators](#)



**Principles of Banking
Virtual Classroom**

**Connect the pieces and see how your
role connects to a larger world with
Cynthia Stuart**

Principles of Banking is a foundational course that supports career understanding. Every employee of a financial institution benefits from understanding how they are part of the overall business.



Starts Thursdays, September 7!

cftea.org



**Consumer Lending
Virtual Classroom**

**Gain Industry Insights
with Nancy Hines**

Designed for entry-level lenders, consumer credit personnel, and financial institution employees who need to understand consumer credit from an insider's view.



Starts Tuesdays, September 26!

cftea.org

“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!”

Custom In House Option

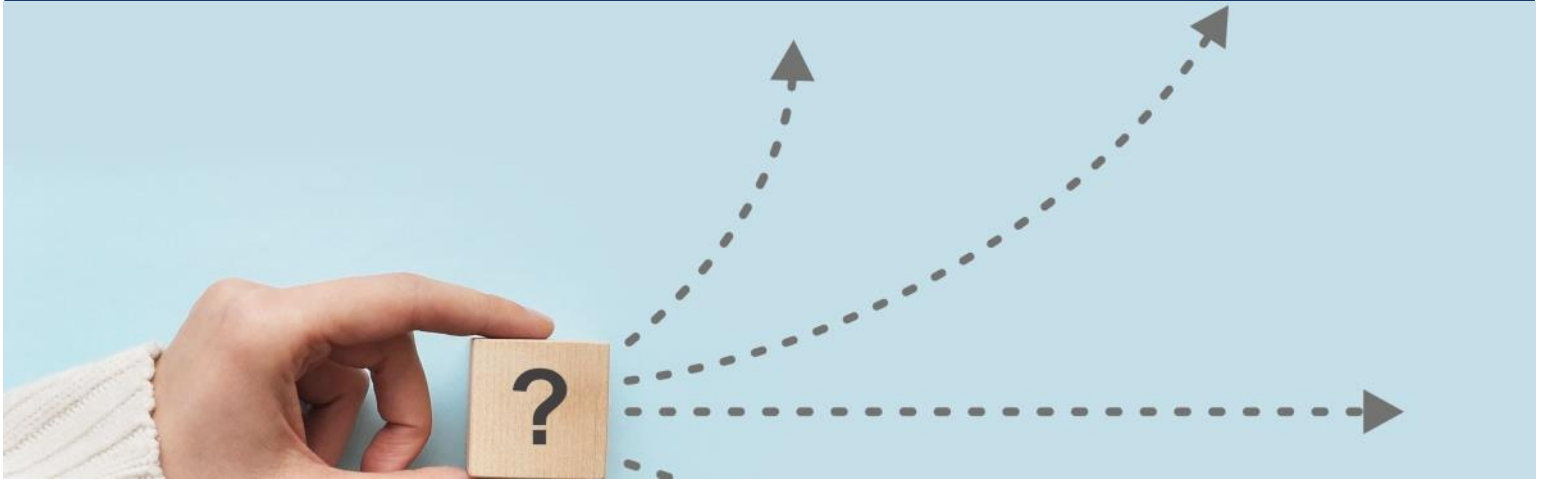
Interested in:

- Stretching your training budget dollars with even more affordable options?
- Access to instructor materials at no charge to you?
- Incorporating your organization's own policies, procedures, and culture into source material without recreating content?
- Engaging and retaining employees, enhancing confidence, and building a powerful team?
- Actively recognizing employee growth and initiative?

CFTEA enables organizations to share the knowledge and empower a whole new generation of employees with confidence, insights, and real-world understanding of the banking industry. All this at a fraction of the regular price.

Don't miss out! [Contact the CFTEA office](#) today to find out how your organization and employees can benefit from this unique solution and what is required to gain approval as a CFTEA instructor.





[Professional Writing Certificate](#)



Our [Professional Writing Certificate](#) provides a cost-effective and engaging self-paced experience with an Ask the Expert feature for instructor feedback. *This new certificate provides SHRM, HRCI, CEU, and PDU professional credits.*

[Professional Speaking Certificate](#)



Our [Professional Speaking Certificate](#) provides a cost-effective and engaging self-paced experience with an Ask the Expert feature for instructor feedback. *This new certificate provides SHRM, HRCI, CEU, and PDU professional credits.*

WHAT'S NEXT

[Verbal Communication Guided Learning](#)



Looking for a learning experience tailored to your speaking goals with customers, co-workers, small groups, volunteering, or large groups? [Verbal Communication](#) is available as a Guided Learning option with instructor support. This course is part of several [CFTEA diplomas](#).

WHAT'S NEXT

[Written Communication Guided Learning](#)



Take the next step with your writing and enhance your professional image. [Written Communication](#) Guided Learning gives you access to personalized feedback on your writing from a business professional. This course is part of several [CFTEA diplomas](#).



Succeeding as a Team Leader / Supervisor Bundle



A team leader or supervisor's ability to motivate, inspire, guide, and coach their teams can impact everything from employee engagement to retention to productivity. The [Succeeding as a Team Leader / Supervisor Bundle](#) was created to support team leaders and supervisors in modern workforce challenges. This bundle directly applies toward the [Professional Team Leader / Supervisor Certificate](#) and includes the following courses:

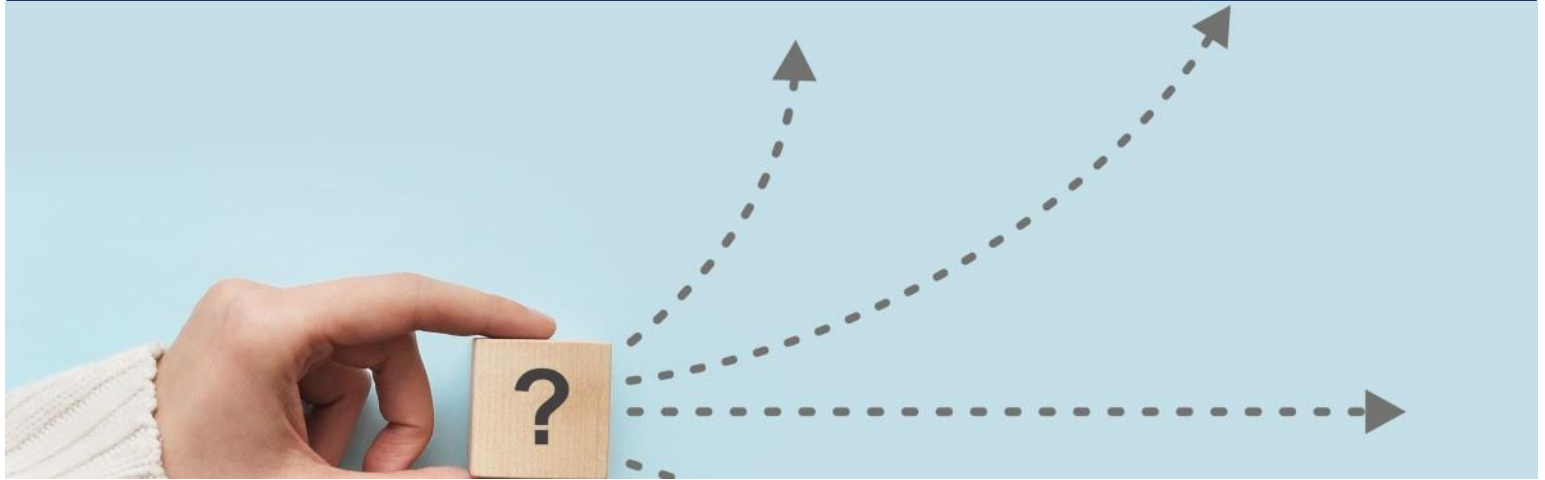
- Balancing Priorities
- Basics of Style: How Personality Shapes Communication, Leadership, and Teamwork
- Team Excellence
- The Art of Influencing Others
- Staying Focused: Handling Change and Uncertainty in the Workplace

Growing as a Team Leader / Supervisor Bundle



A good team leader or supervisor makes an impactful difference in the workplace. So how can you improve? And how can you avoid common mistakes? The cost-savings [Growing as a Team Leader / Supervisor Bundle](#) was created to help foster critical people skills needed for continued growth. This bundle directly applies toward the [Professional Team Leader / Supervisor Certificate](#) and includes the following courses:

- Handling Workplace Conflict
- Mental Models: Making Reality-Based Decisions
- Navigating Difficult Conversations
- The Business of Listening
- Time Management for Personal and Professional Productivity



Creating a High Performing Team Bundle



A high-performing team is more than a collection of skilled employees. They need coordination, communication, and the ability to complement each other's skills and working styles. The [Creating A High Performing Team Bundle](#) highlights a team leader or supervisor's role in building a team with inspiration and diversity. This bundle directly applies toward the [Advanced Professional Team Leader / Supervisor Certificate](#) and includes the following courses:

- Adapting Your Leadership Style
- Assertiveness Skills
- Creating a Culture of Ownership and Responsibility
- Keys to Successful Mentoring
- Onboarding New Employees

Modern Supervisor Certificate



Put theory into practice. Gain the proper tools for success as you advance as a Supervisor. This certificate program enhances skills needed to thrive in the role of a new supervisor. This certificate directly applies toward the [Advanced Professional Team Leader / Supervisor Certificate](#) and includes the following courses:

- Behavioral Interviewing
- Coaching for Development
- Delegating for Growth
- Diversity Awareness
- Ethics in the Workplace
- How to Handle Change and Upheaval
- Ongoing Performance Development
- Toughest Supervisor Challenges



Boost Your Confidence Bundle



Confidence and productivity are closely related. And, while we can be our best cheerleader, we can also be our biggest critic. This cost-savings bundle provides good news to be more cheerleader and less critic. The [Boost Your Confidence Bundle](#) was created to provide access to critical skills for success and confidence—personally and professionally. This bundle directly applies toward the [Essentials of Success Certificate](#) and includes the following courses:

- Steps to a Powerful Personal Brand
- Transforming Key Areas of Your Life
- Finding Your Way by Finding Your Why
- Fearlessly Find and Foster Your Life
- Managing Emotions in Times of Stress and Uncertainty

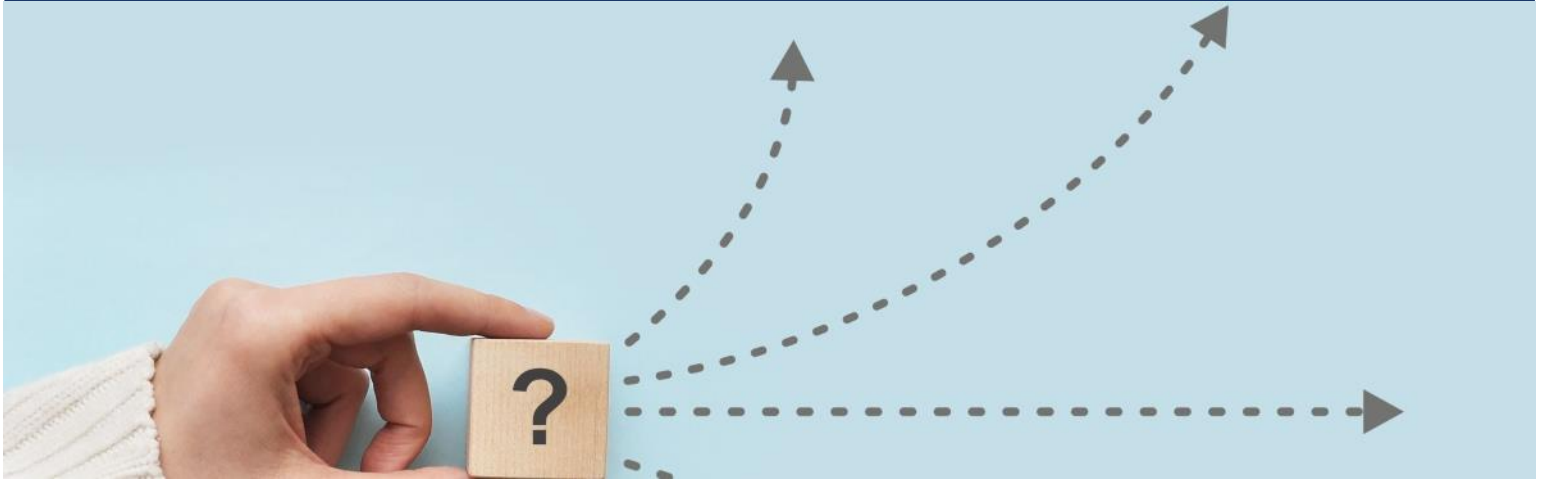
Skills for Your Best Tomorrow Bundle



The future of work is changing rapidly. How can we keep pace with change to ensure future career success? Developing your skills today can give you the best tomorrow in many ways. You can increase your earning potential, become more marketable to employers, and improve your overall quality of life.

The cost-savings [Skills for Your Best Tomorrow Bundle](#) was created to help foster critical soft skills. This bundle directly applies toward the [Essentials of Success Certificate](#) and includes the following courses:

- Resilience in Challenging Times
- Emotional Intelligence
- Critical Thinking Skills
- Dealing with Distractions
- Reach Your Goals



Modern Workforce Skills Bundle



There are tasks and there are skills to enter and remain viable in the workforce. The [Modern Workforce Skills Bundle](#) was developed to address in-demand skills required to stand out and excel among peers. Use these educational tools to think about developing skills and qualifications that make you unique. This bundle directly applies toward the [Modern Workforce Certificate](#) and includes the following courses:

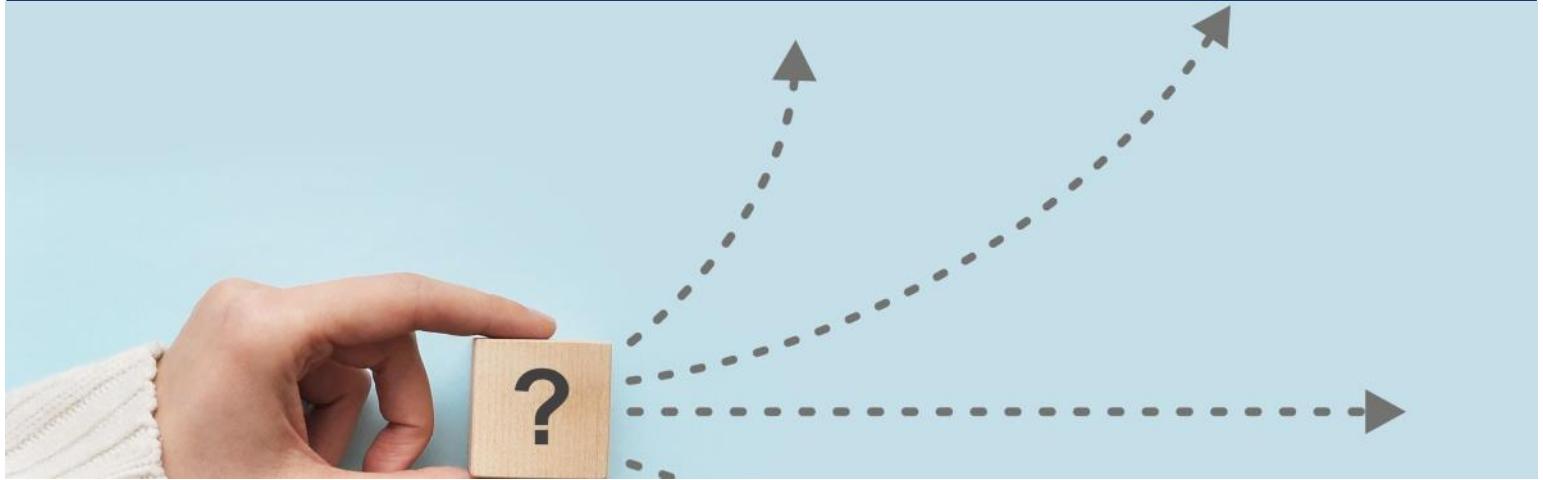
- Creative Problem Solving
- Emotional Intelligence
- Quality Service

Modern Workforce Mindset Bundle



What's the secret to long-term happiness at work? It's your mindset. Organizations that foster a growth mindset environment see greater innovations and a stronger sense of trust, ownership, and commitment across teams. How can you unlock it?. The cost-savings [Modern Workforce Mindset Bundle](#) was developed to support looking at things in new ways and challenging you to be your best version in the modern world. This bundle directly applies toward the [Modern Workforce Certificate](#) and includes the following courses:

- Effectively Managing Stress in the Workplace
- How to Make Yourself a Valued Professional
- Staying Focused: Handling Change and Uncertainty in the Workplace
- Your Role as a New Banker



Unlocking Your Potential as a Professional Bundle



Professional Certificate

Do you want to maximize your success? With the right tools you can open up a world of opportunities for yourself in a highly competitive market. The Unlocking Your Potential as a Professional Bundle was developed to support your career potential while unlocking new doors. This bundle directly applies toward the Evolving

- Balancing Priorities
- Developing Positive Work Relationships
- Emotional Intelligence

- Staying Focused: How to Handle Change and Upheaval
- Your Role as a New Banker

Career Planning Bundle



Life is moving quicker than ever. Soft skills have moved away from traditional knowledge and rely on leveraging new perspectives. Enhance your personal and professional experiences. This certificate directly applies toward the Career Planning Bundle and includes the following courses:

- Critical Thinking Skills
- Handling Workplace Conflict
- How To Make Yourself a Valued Professional

- The Art of Influencing Others
- Working Effectively with Co-Workers

Introducing

2024 Training Conference & Expo



For more than 45 years, learning experts and professionals from all industries and experience levels have come together to forge lifetime bonds, learn real-world best practices, and transform training at the annual Training Conference & Expo.



Shanna Emanuel

“The 2023 Training Conference was an amazing experience. Not only did I learn a lot, but I also got to hear from non-banking organizations about the way they train and how they are facing similar pain points. The presenters and expo booths provided many take-home resources for me to continue learning well beyond the event. I highly recommend anyone in a training or coaching position to attend, and I look forward to the possibility of participating again myself!”

Sessions give attendees the very best in skill-building content, covering train-the-trainer essentials (design, development, delivery, management, evaluation and measurement), eLearning, behavioral analytics, emerging technologies, and more. Attendees may also attend an in-depth pre-conference Certificate Program.

As a CFTEA member, you can save \$150 off the 3-Day Conference & Expo fee with discount code: CFTEA. This discount may be used on top of the Early Bird rate.

Training 2024 Conference & Expo • February 26-28, 2024 · Orlando, FL

Learn more at: <https://cftea.org/product/training-conference-expo/>

Gaining Outside Credits / 2023-2024 Awards Catalog



Have you completed an ABA, ICBA, internal or outside training through another organization? A course may transfer for credit into CFTEA to apply toward certificates or diplomas. There is a nominal \$15-\$25 charge per course transfer to cover review and acceptance. Think about the variety of your current training and discover if you are already closer to a career certificate or diploma than you think!

Organizations submitting a large number of transfers may receive a discount based on a case-by-case basis.

[2023-2024 Awards Catalog](#)

Look To Complete Your Next Certificate or Diploma!

CFTEA



2023-2024 Award Worksheets

- ★ Career Paths
- ★ Certificates
- ★ Certifications
- ★ Diplomas

Click to Learn More!



Track your progress to career success!

- Have you seen the latest updates to our awards (certificates, certifications, and diplomas)?
- Would you like to print off award worksheets?
- Not sure where to begin to advance your career?

Look at suggested options from CFTEA under [your current](#) or [desired position](#). [Contact us for individual guidance](#).

Discover the full range of options, hyperlinked to our website, and with printable worksheets to track your progress as you work toward your career goals.

Continue your learning on the go!



Welcome to the CFTEA Global Skills Workplace Library of audiobooks. New audiobook content along with accompanying eBooks are added to the library each quarter in this growing library.

Current audiobook titles include:

- [Building Confidence and Assertiveness](#)
- [Improving Mindfulness](#)
- [Increasing Your Happiness](#)
- [Transforming Key Areas of Your Life](#)

Coming Fall 2024

Ten Soft Skills You Need



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](#) self-paced or [Your Role as a New Banker Virtual Classroom](#)
- [Today's Teller](#) or may be substituted with proof of internal teller training at your organization at no charge.

What is your business brand? How do you present your-

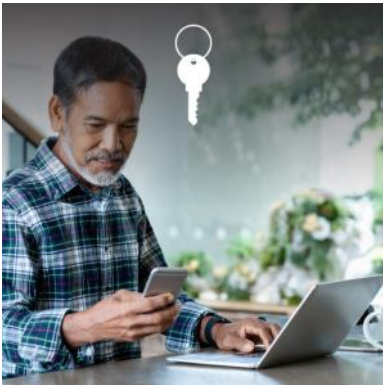
self as a professional? This certificate program prepares those aspiring for a successful career in a financial institution with critical and in-demand skills.

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](#).

Course Spotlights

Looking for a course that gives an overview of Principles of Banking to an employee new to a financial institution without the full expense? Discover options for the course Banking Today!

Banking Today



Guided Learning: [Banking Today](#)

Course Access: Four months to complete on days/times that are convenient to you. Students control how quickly they finish the material and have access to a subject matter expert for questions. The material covers the basics on how the banking world operates, how it relates to the United States economy, and how financial

institutions function as a business. This information is centered around empowering banking employees to understand the world in which they function.

This course is part of the [Certified Modern Banking Representative](#) as well as fifteen other certificates.

Principles of Banking



[Principles of Banking](#) Options

This course is foundational to all employees of a financial institution and is recognized as the most comprehensive introduction to the banking industry for over 50 years. Course material covers the fundamental information employees need to fully understand the business of banking, how they as an employee are part of the overall business while examining contemporary issues.

- May be taught in-house at any organization. [Ask for more information.](#)
- [Guided Learning Principles of Banking](#) (Up to six months to complete)

A comparison of the importance CFTEA places on cost-effective options as a community non-profit: (Principles of Banking)

Other Organizations: \$760

**ABA Direct: \$615
23**

CFTEA: \$450

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.](http://cftea.org)

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



Legal Foundations in Banking

[Guided Learning](#) A1080GL
[Virtual Classroom](#) A1080VC



Quality Service

[Guided Learning](#) C1045GL



Fighting Fraud: Top Scams Targeting Our Nations Seniors

Self Paced Online C1063SP

FREE

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

Featured Earn Your Distinction and Stand Out
As a new front-line banking professional, the updated **Certified Modern Banking Representative** allows you to stand out and grow your career.



[CLICK HERE](#)

cftea.org



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](#)

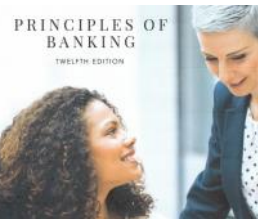
[Self Paced Online S5018SP](#)



Legal Foundations in Banking

[Guided Learning A1080GL](#)

[Virtual Classroom A1080VC](#)



Principles of Banking

[Guided Learning A1370GL](#)

[Virtual Classroom A1370VC](#)



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

[Self Paced Online](#) [C6024SP](#)



Fundamentals of Mortgage Lending

[Self Paced](#) [C6026SP](#)



Fundamentals of Small Business Banking

[Self Paced Online](#) [C6056SP](#)



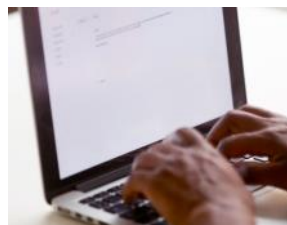
Introduction to Leadership

[Self Paced Online](#) [M5028SP](#)



Introduction to Analyzing Financial Statements

[Self Paced Online](#) [A1076SP](#)



Written Communication or Professional Writing Certificate

[Guided Learning](#) [C1865GL](#)

[Self Paced Online](#) [M5155SP](#)

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



The debate whether leaders are born or made has been waged for many years. The question centers around how various leadership qualities are acquired. Perhaps a more pressing question for hopeful leaders is, if they don't inherently have the needed core skills, can they be learned? The answers, while not endorsed unanimously, are based on a number of observed realities. Of the many skills required to lead well, it's hard to imagine anyone being born with them all; they are too intricate and diverse for one personality. Most experts agree that a number of leadership attributes require experience to possess.



"I got a lot out of the Leadership for [Women in Business Certificate](#) and would recommend it to other women leaders. At first, I thought it would benefit new leaders only, but it included good reminders on topics that I hadn't considered for a while. It is worth the time and investment to any female leaders." - Judy Folsom

Discover more about CFTEA leadership options!

[Introduction to Leadership Certificate](#)

[Leadership for Women in Business Certificate](#)

or [with ACE CREDIT](#)

28 or with [ACE CREDIT](#)

Introducing

NMLS CEUs / Community Connections

Mortgage education, on your time

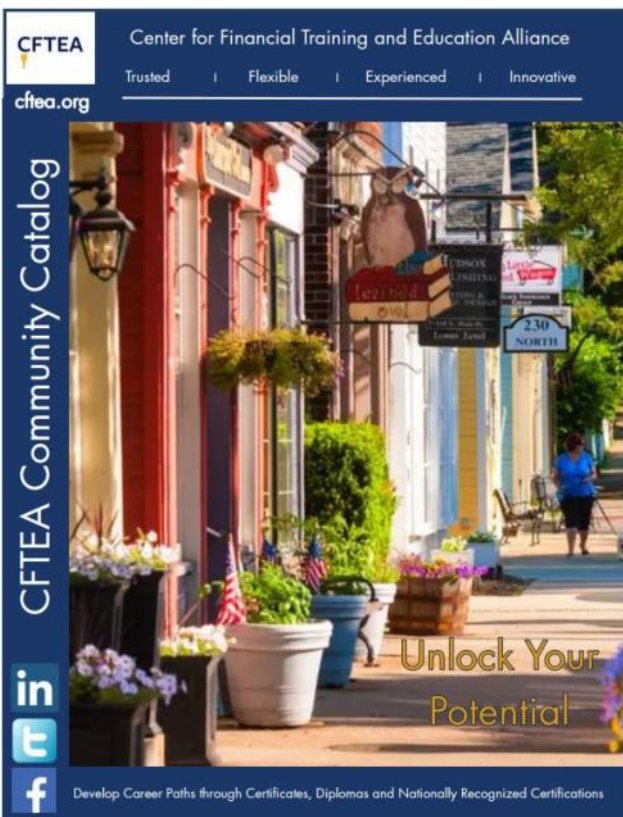
Training to support your mortgage loan officer (MLO) career and NMLS continuing education credits.



- Earn your NMLS license in any state.
- Access test prep classes and study tools
- Renew your mortgage license



Click to search for convenient online mortgage training for every state.



CFTEA Center for Financial Training and Education Alliance
Trusted | Flexible | Experienced | Innovative
cftea.org

CFTEA Community Catalog

Unlock Your Potential

Develop Career Paths through Certificates, Diplomas and Nationally Recognized Certifications

Discover CFTEA Community Connections

As a perk for working with CFTEA our courses (many non-banking related) and preferred pricing are available to your customers in the community.

CFTEA works with numerous community groups and adult education programs to collaborate in identifying, re-skilling, and training potential qualified job candidates. Find out what partnership opportunities may be available in your area.

Explore the [CFTEA Community Catalog](#) for details.



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!

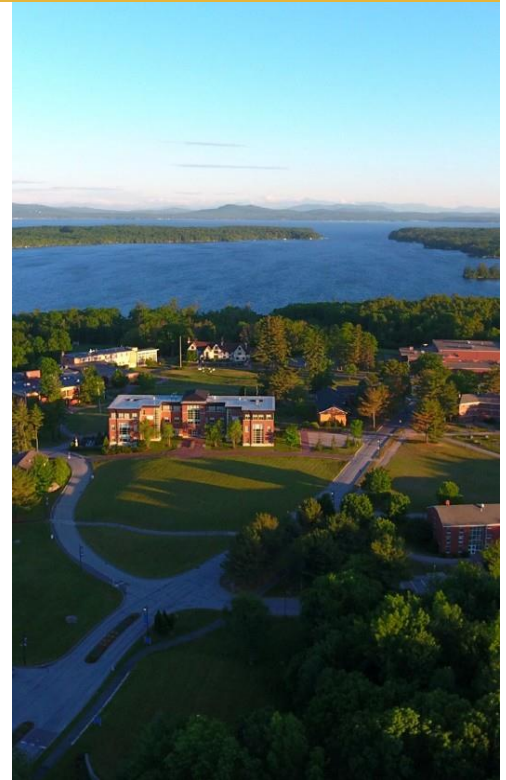
You will be assigned a dedicated student support specialist who will provide guidance on course selection and act as a mentor as you complete your degree. He or she will be your personal advocate and will provide an important link to the faculty, administration, and other college resources.

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

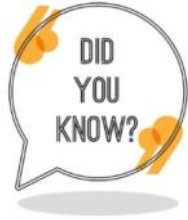
Established in 1912.
Educating for life.
Saint Joseph's College
278 Whites Bridge Road
Standish, ME 04084

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.

Business Administration Degree with Banking Major

Transfer Approved CFTEA Courses

The following CFTEA courses have been approved to directly transfer into the Business Administration Degree with a Banking Major.

- [Analyzing Financial Statements](#)
- [Commercial Lending](#)
- [Consumer Lending](#) or [Consumer Lending Certificate](#)
- [Legal Foundations in Banking](#)
- [Marketing](#)
- [Money and Banking](#)
- [Principles of Banking](#)
- [Residential Mortgage Lending](#)
- [Supervision](#)
- [Verbal Communication](#)
- [Written Communication](#)

Questions or in need of a transcript? [Contact our office for personalized assistance and support.](#)

Looking to Transfer ACE Accredited Courses into a College?

Non-credit to credit pathways translate to non-credit achievements. CFTEA offers ACE credit courses to support your career journey. The following CFTEA certificates also carry ACE Accreditation:

- [AGILE Project Management Certificate \(ACE Accreditation\)](#)
- [Conflict Management Certificate \(ACE Accreditation\)](#)
- [Digital Marketing Certificate \(ACE Accreditation\)](#)
- [Entrepreneurship Certificate \(ACE Accreditation\)](#)
- [HR Management Certificate \(ACE Accreditation\)](#)
- [Leadership Certificate \(ACE Accreditation\)](#)
- [Leadership for Women in Business Certificate \(ACE Accreditation\)](#)
- [Management Skills \(ACE Accreditation\)](#)
- [Project Management Certificate \(ACE Accreditation\)](#)
- [Small Business Management Certificate \(ACE Accreditation\)](#)

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.

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, your month and day of birth 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 month and day of birth. 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 (under 1 credit)..... \$15.00
- Per course transfer (greater than 1 credit).\$25.00

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.

Extension Policy

Extensions are granted upon request prior to the original due date when students have completed at least 50% of the course by the original due date.

Extensions are available for Self Paced courses.

- \$30 Extension Fee of one month for self-paced courses costing \$99 or less.
- \$50 extension fee of one month for self-paced courses costing \$100—\$449.
- \$100 extension fee for one month for self-paced courses costing greater than \$450.

Extensions are available for Guided Learning courses.

- \$100 extension fee for three months for guided learning courses.

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 approved 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 under each product at www.cftea.org.



MANUAL ENROLLMENT FORM

Enroll online at: www.cftea.org

Or complete form, scan to email: info@cftea.org

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

Organization Name and Address (Mailing and Physical Address):

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

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



<input type="text"/>

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

Course #	Course Title	Location, if applies	Date, if applies

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

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

<input type="text"/>		<input type="text"/>	
Student Signature		Date	Authorization of Student's Employer

Additional Notes to CFTEA Office: _____