

CFTEA



Center for Financial Training & Education Alliance

Unlock your potential.

ABOUT US

We started in 1926, fueled by a passion for accessible education. Today, we're CFTEA, a non-profit where YOU are at the heart of everything we do.

Generations have discovered why CFTEA is unique:

- **Trusted:** We've been helping people reach their career goals for over a century.
- **Flexible:** Learn on your terms, at your pace, with programs designed for busy lives.
- **Passionate:** Our instructors and staff are experts who care about your success.
- **Innovative:** We're constantly pushing boundaries to bring the best learning experiences.

Ready to unlock your career potential? Visit www.cftea.org and see what CFTEA can do for you!



An Accessible Non-Profit Learning Community

2024 JULY

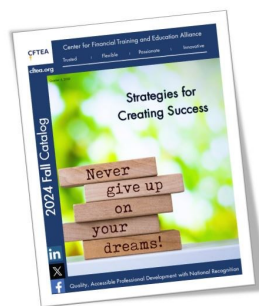
CFTEA INSIDER

WHAT'S INSIDE

- CFTEA Video to Share with Employees
- 2024 Awards and Goodie Bags!
- Join the 2024 Leaders Conference
- CFTEA Gives Back!
- New Commercial Portfolio Manager Career Path!
- New and Updated Courses
- Virtual Classroom Schedule (September—October 2024)
- How Does CFTEA Stand Out?



EXPLORE OUR UNIQUE SOLUTIONS AND EMPOWERMENT NOW.



THE FALL 2024 CATALOG IS HERE!

Thank you for all the suggestions on content. Have you seen the latest including what is coming in 2025?

[VIEW OUR CATALOG](#)



2024-2025 CERTIFICATE AND DIPLOMA CATALOG

Certificates and diplomas got even better! Click the updated button for the new requirements.



www.cftea.org

[888.366.3242](tel:888.366.3242)

CFTEA VIDEO TO SHARE WITH EMPLOYEES

In 2023 an idea came into CFTEA from a community bank. Is there any video to help employees know more about CFTEA and what it offers.

With a huge in-kind donation from NSquared Media Solutions of Maine and First National Bank, CFTEA was off to Bangor, Maine to shoot its very first video! Thank you is not enough to Frank Welch and his wife and CFTEA board member, Carrie Welch, for making it all happen!

This video (under 2 minutes) gives details on what CFTEA offers. Click to download and share with your organization on the intranet, LMS, or during employee orientations.



2024 CERTIFICATE & DIPLOMA RECOGNITION

Recognition bags from CFTEA went out the first week of June.

We've had some great social media engagement. Thank you for sharing photos from within your organization or tagging CFTEA!

If you haven't done so yet—it is not too late.

Haven't received your CFTEA package?
[Reach out to Tammy in the CFTEA office for tracking.](#)

With the change from select banquets to award packages, we've heard some great stories of how organizations are providing recognition and excitement around employee achievements!

Join the 2024 CFTEA Leaders Conference

Theme: Strategies for Creating Success

September 25 & 26, 2024

Village by the Sea | Wells, Maine

Board and Council members invite those with a passion for education to an opportunity to share best practices in learning & development, engage with peers, and find solutions!

[Click to Learn More!](#)

cftea.org

In an age of increasing disconnection, the CFTEA Leaders Conference is the destination for meaningful connections and immersive learning experiences.

Registration deadline is Monday, August 5, 2024.

CFTEA is unique in providing free content. In 2023-2024, the amount of free courses, training, workbooks, and exam retakes so far:

Free Courses:

145

Community Reinvestment:

\$30,303

“

“The most important thing is to try and inspire people so that they can be great in whatever they want to do.”

”

ANNOUNCING: NEW CAREER PATH

CFTEA is pleased to announce a new career path:
Commercial Portfolio Manager!

This option came from new CFTEA council member, Michelle Dumont, and gained approval through the CFTEA Education Committee and includes:

[Commercial Portfolio Manager Certificate](#)

[Commercial Portfolio Manager Diploma](#)

Master the art of commercial loan portfolio management with these in-depth programs!

CHANGE AHEAD: COURSE UPDATES

The following courses have been updated for awards!

[Accounting Basics](#)

[Artificial Intelligence for HR Professionals](#)

[Artificial Intelligence for Marketing Professionals](#)

[Cash Management Services](#)

[Commercial Loan Documentation](#)

[Commercial Loan Structuring](#)

[Exploring P2P and Digital Payments Systems](#)

[Flood Insurance](#)

[Mortgage Fraud and Ethical Behavior](#)

The following courses are new or scheduled for updates for awards!

Bookkeeper Certificate

Creating Psychological Safety at Work

Ethical Issues for Bookkeepers

Fundamentals of Bookkeeping

Fundamentals of QuickBooks Online

Home Equity (Open End Credit)

Loan Servicing and Administration

Meaningful Recognition for Today's Workforce

Safeguarding Customer Information and Non-Public Areas

The Leadership Experience

Wire Transfers

VIRTUAL CLASSROOMS



September 2024

[Aging in the Workplace: Minimizing Health Care Expenses in Retirement](#)
9/10/2024 at 9:00 am (no charge)

[Branch Manager Bootcamp: The Evolving Role of the Branch Manager](#)
starts 9/17/2024

[Branch Manager Bootcamp: The Evolving Role of the Branch Manager](#)
starts 9/18/2024

[Branch Manager Bootcamp: The Evolving Role of the Branch Manager](#)
starts 9/26/2024

October 2024

[Legal Foundations in Banking Virtual Classroom](#)
starts 10/2/2024

[Calming Upset Customers and Co-Workers](#)
10/2/2024

[Outside Calling School for Branch Managers, Lenders, and Business Development staff](#)
starts 10/2/2024

[Calming Upset Customers and Co-Workers](#)
10/8/2024

[Principles of Banking Virtual Classroom](#)
starts 10/17/2024

[Outside Calling School for Branch Managers, Lenders, and Business Development staff](#)
starts 10/17/2024

[Written Communication Virtual Classroom](#)
starts 10/22/2024

Organizations can choose where they get their training and spend education funds. As a community non-profit, CFTEA programs fill a unique role that provides tangible benefits for quality education, affordable options, and collaboration for professional development.

1

Budgetary Savings Compared to Other Training Options

Usually, price is a starting point; with many offers, it is always good to compare. CFTEA provides its entire training library at substantially reduced prices to better support community organizations.

Example: ABA Principles of Banking - From ABA directly or Associations - \$765 no textbook
 Other CFT Organizations - \$795 w/textbook
 ABA offered through CFTEA - \$499 w/textbook

Teach CFTEA courses in-house and save even more!

Another association offers a course named "Principles of Banking", for \$499, but it covers similar content to the shorter CFTEA Banking Today course (\$245) and is not equivalent to ABA's Principles of Banking.

CFTEA reinvested over \$30,000 in our communities this year! This includes 145 free courses, workbooks, board training, and even exam retakes. Giving back is at the heart of our mission.

“I've been researching training options. I have some ideas about how we can best grow our pipeline, in a way that could save us money. By choosing CFTEA, we not only save on training but also positively impacts the community.”

2

Impartial Personalized Support

CFTEA prioritizes your success, not just a sale. We offer ongoing support, advocate for you with industry partners, and track your progress.

After the sale, CFTEA continues to provide communication on course completions, certificate tracking, e-mail reminders, and employee course progress and more!

“While cost is important, it's important to look at the full value of a training program. CFTEA has personalized support that goes above and beyond to help employees reach their career goals.”

3

Educational Content

CFTEA stays current: We regularly review and update content from national partners to keep it relevant and engaging. This ensures you get the most value for your training budget.

CFTEA listens: We actively seek and implement feedback to improve our content, offering a unique partnership for your organization. This means you can be confident your training dollars are well-spent.

Flexible Learning: CFTEA offers a variety of delivery options to fit your needs, including guided learning, in-house training, live sessions, self-paced learning, virtual classrooms, and webinars.

“Ensuring our training dollars have a real impact is crucial. CFTEA actively seeks feedback to improve their offerings and has different delivery methods, so our employees can choose what type of learning suits them best.”

4

Community Resource Focus

CFTEA builds your talent pipeline: We partner with the community education to find and train qualified candidates, attracting new talent you might have missed. Learn more about how CFTEA can help you build a strong workforce.

“Did you know CFTEA works with area organizations to support us in training potential employees before they are hired? And, we can be involved!”

5

A Voice For Now and the Future

CFTEA empowers your voice (since the 1920s!). You have a say in course content, updates, and career development. Open communication keeps them relevant, with recent content reflecting member feedback. This translates to leadership opportunities, training, and vast network supporting your success.

“CFTEA has always provided organization's with a voice in shaping our training and employee engagement. Let me tell you how this can help us.”



UNLOCK YOUR POTENTIAL



GET IN TOUCH

-  WWW.CFTEA.ORG
-  INFO@CFTEA.ORG
-  888.366.3242
-  FACEBOOK.COM/CFTEA.ORG
-  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, affordable, and accessible educational programs.