

CENTER FOR FINANCIAL TRAINING & EDUCATION ALLIANCE

Two exciting new certificates are available from ABA: **ABA UNIVERSAL BANKER CERTIFICATE** AND **ABA BRANCH MANAGER CERTIFICATE**

The **NEW Universal Banker Certificate** provides the core knowledge and skills needed for the newest and fastest growing role in retail banking. Universal bankers have multi-faceted job responsibilities, ranging from minimal cash handling and basic transactions to product and service sales and referrals to other lines of business. The coursework in the certificate ranges from key product knowledge to relationship building, customer service, and expert referral skills. This certificate is designed to help new and newly promoted Universal Bankers cater to a changing customer mindset by being the single point of contact for walk-in customers, thereby reducing the number of warm transfers and providing a more seamless experience.

The required courses can all be taken as self-paced online classes, and can be offered as live classes in your area. **Contact Tanya Kolonoski, Tanya@cftea.org or Tammy Perkins, Tammy@cftea.org for more information or assistance.**

Banking Today OR ABA Principles of Banking
Building and Retaining Customer Relationships
Consumer Credit Products
Cross-Selling Deposit Products
Dealing Effectively with Co-Workers
Effective Client Referrals
Ethical Issues for Bankers
Introduction to Relationship Selling
Presentation Skills
Revitalizing Customer Service
Understanding Bank Products



CFTEA
60 Pineland Drive
Auburn Hall, Suite 303
New Gloucester, ME 04260

Phone: 207-688-6225
Fax: 207-688-6223
E-mail: tammy@cftea.org

WWW.CFTEA.ORG



The NEW Branch Manager Certificate prepares individuals to manage a banking office by covering banking essentials, sales management, people management, and business management skills. Branch managers manage the activities of branch offices and offer deposit and loan products to businesses and individuals. In addition to broad knowledge of banking and banking operations, the responsibilities of Branch Managers require expertise in lending, branch operations, staff supervision and development, sales management and customer service. This certificate addresses these core competencies, providing branch managers with the knowledge and skills they will need to drive their team and bank performance.

The required courses can all be taken as self-paced online classes, and can be offered as live classes in your area. **Contact Tanya Kolonoski, Tanya@cftea.org or Tammy Perkins, Tammy@cftea.org for more information or assistance.**

Banking Today OR ABA Principles of Banking
Building and Retaining Customer Relationships
Calling on Small Business Customers
Coaching for Success*
Corrective Action*
Effective Written Communication
Ethical Issues for Bankers*
Fundamentals of Consumer Lending
Fundamentals of Small Business Banking
Hiring the Best*
Introduction to Relationship Selling
Leveraging the Benefits of a Diverse Workforce*
Managing Change*
Managing Employee Performance*
Managing Employee Relations*
Rewards and Recognition*
Presentation Skills
Sales Coaching in the Bank
Servicing and Growing Small Business Relationships
Successful Sales Campaigns

Begin earning these credentials today by enrolling into one or two of the self-paced online classes listed for each certificate.

Enroll online at www.cftea.org, OR use the enrollment form attached on the next page.

****The courses listed with an asterisk are part of the ABA Supervisor Certificate. If you have successfully completed the Supervisor Certificate (self-paced or facilitated) you will automatically receive credit for the identified courses. Any other required classes previously completed will also be automatically accepted for credit.***



**ENROLLMENT FORM FOR ABA SELF-PACED ONLINE CLASSES REQUIRED FOR THE UNIVERSAL
BANKER CERTIFICATE AND/ OR THE BRANCH MANAGER CERTIFICATE**

CENTER FOR FINANCIAL TRAINING ENROLLMENT FORM
60 Pineland Drive Suite 303, New Gloucester, Maine 04260

Enroll online at: www.cftea.org, OR complete this form and:

SCAN to email: info@cftea.org • FAX: 207-688-6223 Call 1-888-366-3242 or 207-688-6225 with questions.

NAME: _____ Last four digits of your Social Security # _____

Telephone #: _____ Fax #: _____ Email address _____

Financial Institution Name and Address (P.O. Box and physical address): _____

Zip Code: _____

EMAIL ADDRESS YOU INTEND TO USE FOR YOUR CLASS: _____

Please check the class(es) you would like to enroll into at this time:

- | | |
|---|--|
| <input type="radio"/> Banking Today | <input type="radio"/> Introduction to Relationship Selling |
| <input type="radio"/> Building and Retaining Customer Relationships | <input type="radio"/> Leveraging the Benefits of a Diverse Workforce |
| <input type="radio"/> Calling on Small Business Customers | <input type="radio"/> Managing Change |
| <input type="radio"/> Coaching for Success | <input type="radio"/> Managing Employee Performance |
| <input type="radio"/> Consumer Credit Products | <input type="radio"/> Managing Employee Relations* |
| <input type="radio"/> Corrective Action | <input type="radio"/> Presentation Skills |
| <input type="radio"/> Cross-Selling Deposit Products | <input type="radio"/> Rewards and Recognition |
| <input type="radio"/> Dealing Effectively with Co-Workers | <input type="radio"/> Revitalizing Customer Service |
| <input type="radio"/> Effective Client Referrals | <input type="radio"/> Sales Coaching in the Bank |
| <input type="radio"/> Effective Written Communication | <input type="radio"/> Servicing and Growing Small Business Relationships |
| <input type="radio"/> Ethical Issues for Bankers | <input type="radio"/> Successful Sales Campaigns |
| <input type="radio"/> Fundamentals of Consumer Lending | <input type="radio"/> Understanding Bank Products |
| <input type="radio"/> Fundamentals of Small Business Banking | |
| <input type="radio"/> Hiring the Best* | |

I confirm that I have read the withdrawal policies and code of ethics statement in the CFT catalogue and fully understand their meaning. I hereby authorize The Center for Financial Training to release my grades to the American Bankers Association if appropriate and to the appropriate representative at my financial institution. I understand that if I fail to meet the requirements of my financial institution, I may be held personally responsible for tuition and fees to my financial institution. If I am a degree student at a school affiliated with CFT, I authorize CFT to release my transcript and grades to the college I am attending. ** I have read and understand CFT's policies regarding withdrawals.

Student Signature _____

Date _____

Authorization of Student's Employer _____

