Phone (904) 354-4830

Southeast Regional Center for Financial Training, Inc. eLearning Packages

Choose a Content Package specific to an area of banking such as trust or management. We can work with you to design a Content Package specific to your needs and goals.

Please check out these self-paced online options. The attached enrollment form may be used to sign up for these courses, or call Lisa Phillips for more details.

Trust Advisor Skills:

In a world of commodity banking products, the decision-making process of a high net worth client is based primarily on the client's perception of the knowledge and expertise of the client advisor. Studies have shown that prospective clients form their opinion of the institution in the first few minutes of interaction with an advisor. This makes it imperative that your entire team exudes the confidence and knowledge formed through a well-designed training program.

ABA's Trust Advisor Skills eLearning courses provide an in-depth overview of key concepts to enhance your role as a Trusted Advisor. Plus, ABA's Trust Advisor Skills eLearning courses are the industry's only online based pre-certification for the Certified Trust and Financial Advisor (CTFA) designation. CTFA, offered through the Institute of Certified Bankers (ICB), is a credential that is highly valued within today's Wealth Management and Trust industry and demonstrates to clients that the Advisor has the knowledge and skills to truly provide integrated financial solutions in response to their needs.

Offered in three progressive levels of learning, Trust Advisor Skills builds the knowledge and confidence of your staff in dealing with high net worth clients. Courses are also available individually depending on your specific needs.

Courses Include:

Personal Trust Curriculum Level 1:
Building Trust Expertise - Trust Administration
Building Trust Expertise - Taxation & Estate Planning
Building Trust Expertise - Investment Management

Personal Trust Curriculum Level 2:
Discretionary Distributions
Estate Planning Overview
Estate Planning for Marital Deduction
Federal Estate and Gift Taxes
Fiduciary Income Taxes
Fiduciary Law
Investments I
Managing Trust Accounts
Retirement Planning

Personal Trust Curriculum Level 3:
Estate Planning for Charitable Giving
Estate Planning for Lifetime Gifts
Estate Planning for the Business Owner
Estate Planning Final Case Study
Financial Planning Skills
Generation Skipping Transfer Tax
Investments II
Life Insurance and Annuities

Management and Leadership:

Hiring the right person for the right job minimizes turnover. Retaining that employee with ongoing coaching, recognition, and growth opportunities is vital to your bank's success. Management and Leadership training will position your first-time and experienced managers to succeed on both fronts.

Learners will be equipped with the knowledge and skills needed to hire the right candidate, provide ongoing direction, give disciplinary action when necessary, and recognize and reward employees when warranted.

A structured process is presented for identifying, evaluating and hiring the best candidate. Strategies for managing change and demonstrating change leadership are taught, along with problem solution techniques. This program helps participants recognize behavior gaps and demonstrates how to employ a range of corrective modes in a balanced and objective manner.

Techniques for ongoing performance feedback and coaching are taught, as well as hands-on practice in planning a Rewards and Recognition program.

Courses Include:

Performance Management
Coaching For Success
Rewards and Recognition
Hiring the Best
Corrective Action
Managing Change
Managing Employee Relations
Improving Productivity
Ethical Issues for Bankers
Sexual Harassment in the Workplace for Managers

AIB™
American Institute of Banking

Please contact Lisa Phillips at (904) 354-4830 for more information or to register today!