



# Southeast Regional Center for Financial Training, Inc. AIB Certificate Courses

**Five Cost-Saving Certificates are Now Available** - providing you with several options for earning **career-focused** certificates. *Affordable and convenient, these AIB Certificates allow you to progress through each course at a reasonable and comfortable pace. This package option offers high quality education in a cost-saving format. We have made it easier for you to enhance your career by allowing you to complete certificates with eLearning online courses. Self-paced online training is highly interactive and engaging and*

it's available for you to complete anytime, anywhere. These AIB certificates are focused on skills you can immediately apply on your job. Enroll in the series and we will bill your bank. Take courses at your own pace. We estimate the longest course in any of these certificates will take you about 4 hours to complete (except AIB Teller Training Essentials - 8 hours). If you finish one course a week, you could achieve your certificate in approximately 12 weeks, however you have **up to one year** to complete each of these certificates. Sign up for this program now!

## **AIB Call Center Representative Certificate - \$595**

Addresses the knowledge and skills needed to achieve superior performance as a call center representative including a fundamental understanding of banking and banking regulations affecting the position. **SAVE \$450**

- AIB Banking Today
- AIB Cross-Selling Deposit Products
- AIB Dealing Effectively with Co-Workers
- AIB Effective Referrals
- AIB Ethical Issues for Bankers
- AIB Introduction to Relationship Selling
- AIB Regulatory Compliance for Call Center Representatives
- AIB Revitalizing Customer Service
- AIB Teleconsulting
- AIB Telephone Etiquette
- AIB Understanding Bank Products

## **AIB Customer Service Representative Certificate - \$595**

Addresses the knowledge and skills needed to achieve superior performance as a customer service representative, including sales and customer service, regulatory compliance, business ethics and banking fundamentals. **SAVE \$450**

- AIB Banking Today
- AIB Building and Retaining Customer Relationships
- AIB Cross-Selling Deposit Products
- AIB Dealing Effectively with Co-Workers
- AIB Effective Referrals
- AIB Ethical Issues for Bankers
- AIB Introduction to Relationship Selling
- AIB Regulatory Compliance for Customer Service Representatives
- AIB Revitalizing Customer Service
- AIB Telephone Etiquette
- AIB Understanding Bank Products

## **AIB Bank Teller Certificate - \$595**

Addresses the critical technical skills of the position, practical knowledge and applied skills in banking, regulatory compliance for tellers, and customer service and sales. **SAVE \$260**

- AIB Banking Today
- AIB Business Etiquette
- AIB Dealing Effectively with Co-Workers
- AIB Effective Referrals
- AIB Ethical Issues for Bankers
- AIB Introduction to Relationship Selling
- AIB Regulatory Compliance for Tellers
- AIB Revitalizing Customer Service
- AIB Teller Training Essentials

## **AIB Supervisor Certificate - \$595**

Prepares new supervisors for their emerging responsibilities, including evaluating and selecting employees, and the performance management process. **SAVE \$165**

- AIB Banking Today
- AIB Coaching for Success
- AIB Corrective Action
- AIB Ethical Issues for Bankers
- AIB Hiring the Best
- AIB Managing Employee Relations
- AIB Performance Management
- AIB Rewards and Recognition

## **AIB Team Leader Certificate - \$595**

Helps develop the necessary skills to lead and manage effective teams, including how to meet common objectives and achieve specific results. **SAVE \$165**

- AIB Banking Today
- AIB Coaching for Success
- AIB Dealing Effectively with Co-Workers
- AIB Managing Change
- AIB Meetings that Work
- AIB Presentations Skills
- AIB Rewards and Recognition
- AIB Writing Bank Correspondence

## **AIB Small Business Banking Certificate - \$595**

This certificate is for relationship managers to engage customers, understand their needs and execute appropriate solutions, as well as manage relationships post-sale.

- AIB Banking Today
  - AIB Calling on Small Business Customers
  - AIB Credit Products for Small Businesses
  - AIB Deposit Products and Services for Small Businesses
  - AIB Fundamentals of Small Business Banking
  - AIB Introduction to Analyzing Financial Statements
  - AIB Personal Tax Return Analysis
  - AIB Relationship Selling to Small Business Customers
  - AIB Servicing and Growing Small Business Relationships
  - AIB Small Business Borrowing
- SAVE \$355**

Fill out an enrollment form and fax it in to sign up.



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

Self-Paced Online Courses	AIB #	Course Hours	AIB CRED	ICB CRED	FEE
<b>BASIC BANKING KNOWLEDGE</b>					
Banking Today	1325	3	.5	n/a	\$95
<b>FUNDAMENTAL BUSINESS SKILLS</b>					
Business Etiquette	2506	2	.25	n/a	\$95
Dealing Effectively with Co-Workers	2534	3	.5	n/a	\$95
Ethical Issues for Bankers	0162	2	.5	5	\$95
Managing Time At Work	4342	2	.25	n/a	\$95
Meetings That Work	1877	1	n/a	1.25	\$95
Presentation Skills	5415	2	.25	2.5	\$95
Sexual Harrassment in the Workplace		1	n/a	n/a	\$95
Telephone Etiquette	4814	2	.25	2.5	\$95
Writing Bank Correspondence	1858	3	.5	n/a	\$95
<b>MANAGEMENT AND LEADERSHIP</b>					
Coaching For Success	6876	2	.25	n/a	\$95
Corrective Action	4227	2	.25	n/a	\$95
Hiring The Best	4116	2	.5	n/a	\$95
Improving Productivity	2532	3	.25	n/a	\$95
Managing Change	6808	2	.25	n/a	\$95
Managing Employee Relations	2504	3	.5	n/a	\$95
Performance Management	4226	3	.5	n/a	\$95
Project Management Fundamentals 1	4192	2	.25	n/a	\$79
Project Management Fundamentals 2	4193	2	.25	n/a	\$79
Rewards and Recognition	2502	2	.5	n/a	\$95
Sexual Harrassment in the Workplace for Mgrs		1	n/a	n/a	\$95
<b>REGULATORY COMPLIANCE</b>					
Americans with Disabilities Act (ADA)	0582	1	n/a	1	\$95
Bank Bribery Act	7432	1	n/a	1	\$95
Bank Secrecy Act	7209	2	.25	5	\$95
Bank Secrecy Act for Private Bankers		1	n/a	n/a	\$55
Bank Protection Act	7462	1	n/a	1	\$95
Check 21 Overview	7380	1/2	n/a	n/a	\$45
Community Reinvestment Act	7805	1	n/a	1	\$95
Electronic Fund Transfer Act - Regulation E	6407	1	n/a	1	\$95
Equal Credit Opportunity Act - Regulation B	7321	2	.25	5	\$95
Expedited Funds Availability: Regulation CC	6962	1	n/a	1.25	\$95
Extending Credit to Bank Inside: Regulation O	7324	1	n/a	1	\$95
Fair Credit Reporting Act (FCRA)	7333	2	.25	5	\$95
Fair Housing Act	7319	1	n/a	1	\$95
Fair Lending	7341	2	.25	5	\$95
FDIC Deposit Insurance	7371	1	n/a	1	\$95
Flood Disaster Protection Act	3416	1	n/a	1	\$95
Home Mortgage Disclosure Act - HMDA	7322	1	n/a	1.25	\$95
Office of Foreign Assets Control (OFAC)	7132	1	n/a	1.25	\$95
Privacy for Customer Contact Personnel	7325	1	n/a	2.5	\$95
Real Estate Settlement Procedures Act	5301	2	.25	5	\$95
Regulatory Compliance for Bank Tellers	7390	3	.25	2.5	\$95
Regulatory Compliance for Call Center Reps.	7391	3	.25	3	\$95
Regulatory Compliance for Customer Services Reps.	7392	3	.25	4	\$95
Regulatory Compliance for Personal Bankers	7393	4	.25	5	\$95
Servicemembers Civil Relief Act	0611	1	n/a	1.25	\$95
Truth In Lending Act - Regulation Z	7331	2	.25	5	\$95
Truth-In-Savings - Regulation DD	7350	1	n/a	1	\$95
U.S.A. Patriot Act	0731	1	n/a	1.25	\$95
<b>SMALL BUSINESS BANKING FUNDAMENTALS</b>					
Credit Products for Small Business	6652	3	.25	n/a	\$95
Fundamentals of Small Business Banking	4282	2	.25	n/a	\$95
Introduction to Analyzing Financial Statements	6952	3	.25	7.25	\$95
Overview of Financial Statements	6951	2	.25	5	\$95
Retirement Product for Small Businesses	bf005	2	.25	n/a	\$95
Deposit Products for Small Businesses	4289	2	.25	2.5	\$95

CFT offers additional job specific compliance courses for a discounted fee.

Self-Paced Online Courses	AIB #	Course Hours	AIB CRED	ICB CRED	FEE
<b>SMALL BUSINESS BANKING SALES SKILLS</b>					
Calling On Small Business Customers	4288	2	.25	n/a	\$95
Servicing and Growing Small Business Relationships	4284	2	.25	n/a	\$95
Small Business Borrowing		3	.25	n/a	\$95
Relationship Selling to Small Business Customers	7762	2	.25	2.5	\$95
<b>PERSONAL TRUST - Curriculum Level 1</b>					
Introduction to Estate Planning	8329	6	.5	7	\$335
Introduction to Investment Management	8328	6	.5	7	\$335
Introduction to Trust Administration	8327	8	.5	9.5	\$335
<b>PERSONAL TRUST - Curriculum Level 2</b>					
Discretionary Distributions	8400	6	.5	6.5	\$160
Estate Planning Overview	8401	6	.5	6.25	\$160
Estate Planning for Marital Deduction	8402	6.5	.5	6.0	\$160
Federal Estate and Gift Taxes	8403	10.5	.5	10	\$160
Fiduciary Income Taxes	8404	9.75	.5	8.75	\$160
Fiduciary Law	8405	7	.5	7.75	\$160
Investments I	8406	10	.5	9.25	\$160
Retirement Planning	8407	9.25	.5	8.0	\$160
Managing Trust Accounts	8408	2	.25	2.5	\$160
<b>PERSONAL TRUST - Curriculum Level 3</b>					
Estate Planning for Charitable Giving	8411	9	.5	8.5	\$160
Estate Planning for Lifetime Gifts	8410	3	.25	3.25	\$160
Estate Planning for the Business Owner	8412	10	.5	10.75	\$160
Estate Planning Case Study	8413	2	.25	2.5	\$160
Financial Planning Skills	8414	6.5	.5	6.75	\$160
Generation Skipping Transfer Tax	8415	8.5	.5	7.5	\$160
Investments II	8416	9	.5	9.25	\$160
Life Insurance and Annuities	8417	9	.5	10	\$160
<b>RETAIL BANKING FUNDAMENTALS</b>					
Consumer Credit Products	7016	3	.25	n/a	\$95
Fundamentals of Consumer Lending	7018	3	.5	7.25	\$95
Fundamentals of Mortgage Lending	7836	2	.25	5	\$95
Personal Tax Return Analysis	8008	4	.25	9.75	\$95
Referring Insurance & Annuities Customers	3444	2	.25	n/a	\$95
Referring Mutual Fund & Securities Customers	7242	3	.25	n/a	\$95
Referring Trust Customers	8264	2	.25	n/a	\$95
Revitalizing Customer Service	6496	3	.5	n/a	\$95
Introduction to Financial Planning Products	rb008	4	.25	n/a	\$95
Teller Training Essentials NEW	6384	8	.50	n/a	\$150
Understanding Financial Planning	rb005	2	.25	n/a	\$95
Understanding Bank Products	7766	2	.25	n/a	\$95
<b>RETAIL BANKING SALES SKILLS</b>					
Building and Retaining Customer Relationships	6494	2	.25	n/a	\$95
Cross-Selling Deposit Products	6268	4	.5	n/a	\$95
Effective Referrals	4506	2	.25	n/a	\$95
Event Based Selling	4508	1	n/a	1.25	\$95
Introduction to Relationship Selling	4504	3	.5	n/a	\$95
Profiling Mortgage Prospects	7814	2	.25	2.5	\$95
Sales Coaching in the Bank	4510	2	.25	n/a	\$95
Successful Sales Campaigns	7787	2	.25	n/a	\$95
Tele-Consulting	1884	2	.25	2.5	\$95
<b>CASE STUDY / ASSESSMENT</b>					
ABA Case Study for Wealth Advisors: The Corporate Executive		1	n/a	n/a	\$150

License agreements are available for these eLearning courses. Please call Lisa Phillips at (904) 354-4830.

The complete listing and descriptions for **Microsoft Office 2003** and **Microsoft Office 2007** Courses (Access, Excel, Outlook, Powerpoint, and Word) are on the website, [www.cft-flsc.org](http://www.cft-flsc.org). You can register online. Go to the CFT website, click on the ABA Login button, then click on the registration link.

TECHNICAL REQUIREMENTS ON CFT WEBSITE, [WWW.CFT-FLSC.ORG](http://WWW.CFT-FLSC.ORG).



Fax to **(904) 354-1834**

*Photocopy this page or print it from the "Forms and Info" page at [www.cft-flsc.org](http://www.cft-flsc.org)*

Please print all information clearly.

First Name \_\_\_\_\_ MI \_\_\_\_\_ Last Name \_\_\_\_\_

Title \_\_\_\_\_ Company \_\_\_\_\_

Work Street Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Office Phone Number \_\_\_\_\_ Office Fax Number \_\_\_\_\_

E-Mail Address \_\_\_\_\_ SS# (last 4 digits) \_\_\_\_\_

Your Educational Goal: Please indicate which AIB Diploma or Certificate you are pursuing. \_\_\_\_\_  
 Course Information: Please refer to the course schedule for the information needed to complete this portion of the enrollment form. Course type categories to use on the form below are: In-Person (IP), Instructor-Led Online (ILO), Self-Paced Online/ABA eLearning (SPO), or Assisted Self-Study (SS).

Course Title	Course # (when applicable)	Start Date (when applicable)	Course Type	Amount*
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____

\*Appropriate fees will be added. (i.e. tax, administration - \$10 per enrollment form, shipping and handling - ILO & SS, etc.)

"I hereby agree to abide by my bank's stated policy on educational benefits and should I not complete this course in the manner prescribed, I will reimburse my employer or CFT accordingly. I hereby authorize the release of my grades to CFT and my employer."

Student's Signature \_\_\_\_\_ Date \_\_\_\_\_

**Bill My Bank                      Check Enclosed (Payable to Southeast Regional CFT)                      Sending Wire (Add Wire Transfer Fee)**

"As the approving individual of this student, I authorize payment for this enrollment from my financial institution to CFT, and I understand I may be responsible for processing the invoice generated by CFT for this student."

Approver's Name \_\_\_\_\_ Date \_\_\_\_\_

Approver's Signature \_\_\_\_\_ E-Mail \_\_\_\_\_

Approver's Address \_\_\_\_\_ Phone Number \_\_\_\_\_

Approver's Cost Center \_\_\_\_\_ Send Invoice to \_\_\_\_\_ E-Mail \_\_\_\_\_

**Policies and Procedures**

All enrollment, extension, drop, withdrawal, and other standard policies and fees apply to this enrollment. Please visit the website, call the CFT Office, or e-mail your request for course descriptions, diploma and certificate worksheets, to drop or withdrawal, or if you have other questions.



126 West Adams Street, Suite 501 • Jacksonville, FL 32202  
 Phone: (904) 354-4830 Fax: (904) 354-1834 • [www.cft-flsc.org](http://www.cft-flsc.org)  
 E-mail: [lisaphillipsaft@bellsouth.net](mailto:lisaphillipsaft@bellsouth.net)