

# DISTANCE LEARNING SCHEDULE SUMMER 2023

#### **ONLINE CERTIFICATE PROGRAMS BY JOB ROLE**

CFT/ABA certificate programs build the skills necessary for career advancement. Through a prescribed course of study, certificates provide practical, tailored knowledge specific to a job role in the financial services industry. Programs are continually reevaluated and refined to meet current needs and changes in the industry. Each certificate can be purchased individually as a self-paced online curriculum or can be licensed for a group of employees.

PROJECT MANAGEMENT CERTIFICATE (ACE CREDIT)
ASSEST MANAGEMENT CERTIFICATE
BANK FINANCIAL MANAGEMENT <u>CERTIFICATE</u>
BANK SOLUTIONS PROVIDER CERTIFICATE
BANK TELLER CERTIFICATE
BRANCH MANAGER CERTIFICATE
BSA AND AML COMPLIANCE CERTIFICATE
BUSINESS AND COMMERCIAL LENDING CERTIFICATE
BUSINESS COMMUNICATION CERTIFICATE
CORE CONCEPTS AND ETHICS FOR FIDUICIARY ADVISORS CERTIFICATE
COMPUTER SKILLS FOR THE OFFICE  CERTIFICATE
CREATIVITY AND INNOVATION CERTIFICATE
CREDIT ANALYSIS CERTIFICATE
CUSTOMER SERVICE REPRESENTATIVE CERTIFICATE
CYBERSECURITY CERTIFICATE
CERTIFICATE IN COMPLIANCE ESSENTIALS
CERTIFICATE IN MORTGAGE LENDING COMPLIANCE
DATA ANALYTICS CERTIFICATE (REVISED)
DEPOSIT COMPLIANCE CERTIFICATE
DIGITAL BANKER CERTIFICATE
DIVERSITY AND INCLUSIONS HR
MANAGEMENT CERTIFICATE

EMERGING TECHNOLOGY FOR MANAGERS  CERTIFICATE
FIDUICIARY PRINCIPLES AND ETHICS  CERTIFICATE
FIDUICIARY RELATIONSHIP MANAGEMENT  CERTIFICATE
FIDUCIARY RISK AND COMPLIANCE  CERTIFICATE
FINANCIAL AND CREDIT RISK MANAGEMENT CERTIFICATE
FINANCE ESSENTIALS FOR NON-FINANCIAL  MANAGERS CERTIFICATE
FOUNDATIONAL CERTIFICATE IN BANK MARKETING
FRAUD PREVENTION CERTIFICATE
GENERAL BANKING CERTIFICATE
HEALTH SAVINGS ACCOUNT (HSA) EXPERT  CERTIFICATE
HR MANAGEMENT (ACE CREDIT®)
HR SKILLS FUNDAMENTAL CERTIFICATE
HR SKILLS™ BEST PRACTICES CERTIFICATE
HUMAN RESOURCES ETHICS CERTIFICATE
INTEGRATED WEALTH PLANNING AND ADVICE CERTIFICATE
INTRODCUTION TO ACCOUNTING  CERTIFICATE
INTRODUCTION TO BUSINESS ANALYSIS  CERTIFICATE
INTRODUCTION TO FINANCIAL SERVICES  CERTIFICATE
INTRODUCTION TO FINANCIAL SERVICES  OPERATIONS CERTIFICATE
HUMAN RESOURCE MANAGEMENT <u>CERTIFICATE</u>
INTRODUCTION TO LEADERSHIP CERTIFICATE

es.
INTRODUCTION TO LENDING
CERTIFICATE
INTRODCUTON TO SALES AND SERVICE
CERTIFICATE
LENDING COMPLIANCE CORE
CONCEPTS CERTIFICATE
MANAGING THE HYBRID WORKFORCE CERTIFICATE
MANAGEMENT SKILLS (ACE CREDIT®)
MANAGEMENT SKILLS CERTIFICATE
ONLINE TRAINING CERTIFICATE
OPERATIONAL RISK MANAGEMENT
<u>CERTIFICATE</u>
PERSONAL BANKER CERTIFICATE
PRIVATE BANKER CERTIFICATE
PROJECT MANAGEMENT FOR
INFORMATION TECHNOLOGIES
<u>CERTIFICATE</u>
PROJECT MANAGEMENT FOR TEAMS
<u>CERTIFICATE</u>
PROJECT MANAGEMENT TEAM
LEADERSHIP CERTIFICATE
RESIDENTIAL MORTGAGE LENDER
CERTIFICATE
RISK MANAGEMENT FRAMEWORKS
CERTIFICATE
SMALL BUSINESS BANKER CERTIFICATE
SUPERVISOR/TEAM LEADER CERTIFICATE
TRUST ADMINISTRATION CERTIFICATE
UNIVERSAL BANKER CERTIFICATE
WEB DESIGN CERTIFICATE
WHARTON EMERGING LEADERS
CERTIFICATE – ADVANCED EMERGING LEADERSHIP
WHARTON EMERGING LEADERS
CERTIFICATE – ENGAGING AND
MOTIVATING TALENT
WHARTON EMERGING LEADERS
CERTIFICATE - STRATEGY

### INSTRUCTOR-LED ONLINE CLASSES

#### Save Time and Money with Online Courses

CFT/ABA courses are now more convenient than ever before. All you need is a computer with internet connection and an active e-mail account. That means employees don't have to leave the office or even home to get training, which saves time and travel costs.

#### **Instructor-Led Classes**

Students enrolled in CFT online classes enjoy the flexibility of not being required to be online at a specific day or time and the convenience of having an instructor with subject matter expertise only an email away. Programs are taught by experienced and knowledgeable training specialists. Choose from a variety of courses that can boost your career and the quality of your financial services. Instructor-led courses are offered in 5 through 16 weeks formats.

#### Make a Smart Investment

It's easy to see what a big difference these courses can make to your bank and your bottom line. Yet despite their value, they cost very little.

#### Textbook/Learning Materials

The textbook cost for 10, 15 and 16-week courses is included in the tuition. The 5-week course learning materials are available online. A fee of \$27.00 will be added to the invoice for shipping and handling of textbooks. Please be advised that there is a \$14.00 individual registration fee for all classes.

#### **How Online Courses Work**

The course will be facilitated by an instructor who will guide you through each lesson and is available to answer questions and provide feedback on your assignments.

Each week you will receive an assignment over the Internet. The assignment will include:

- Reading a chapter in your textbook (mailed to you prior to the start of your course) or from your online course material.
- Completing a short assignment and either forwarding the assignment electronically to your instructor or posting it on the electronic class Discussion Board.
- Taking a self-check test.

In addition, you will also have assignments where you will collaborate with other students using electronic discussion boards and e-mail.

#### **Examinations**

Quizzes and exams are administered electronically and are submitted to the instructor for grading. CFT believes strongly in making every student's online technical experience as easy as possible. We support students by having our own technical team available to students 24 hours a day! The industry standard for online course completion is less than 50%, but thanks to the dedication of CFT students and instructors, better than 95% of CFT students successfully complete their online course. CFT is confident that you will too! The semester length courses (10, 15 and 16weeks) have a mid-term examination and a final examination. The 5-week seminars have a final examination only.

#### **Proctored Examination Required**

You will need to identify a person from your institution to proctor your exams Monday – Friday,

between 9 a.m. and 5 p.m. Eastern US time, including a Human Resources training manager, supervisor, or someone from the management team of your organization. Make sure to arrange your proctor well in advance of your exam date.

If you do not work with an institution, you will need to contact CFT to request they proctor your exam. You will be asked to provide the telephone number of your proctor in case we need to reach that person for verification. A relative or friend cannot proctor an exam. All parties must abide by the policy. There are no exceptions.

#### Withdrawal Policy

A student who must withdraw from a CFT instructor-led on-line course must submit a written cancellation. Students who withdraw 7 days or more before the start date of the class are not subject to a withdrawal fee. Students who withdraw between 6 days before the class begins and 11 days from the start date will be responsible for a withdrawal fee of \$150.00 plus book cost (if applicable) unless the book is returned in new condition within 7 days. A student who withdraws after 11 days from the start date will be responsible for the full class tuition.

### ABA INSTRUCTOR-LED ONLINE CLASSES

Course Title	Start Date	End Date	Length	Credits	Price (Member)	Price (Nonmember)
Analyzing Financial Statements (w/Textbook or eBook)	05/08/23	08/25/23	16 Weeks	3	550.00	675.00
Banking Fundamentals Curriculum  All 3 courses below offered together at a discount			12 Weeks	3	595.00	795.00
The Banking Industry	07/10/23	08/04/23	4 Weeks	1	215.00	285.00
Bank Lines of Business	06/05/23	06/30/23	4 Weeks	1	215.00	285.00
Building Customer Relationships	05/01/23	05/26/23	4 Weeks	1	215.00	285.00
Building Customer Relationships	07/31/23	08/25/23	4 Weeks	1	215.00	285.00
Commercial Lending (w/Textbook or eBook)	06/12/23	09/01/23	12 Weeks	3	550.00	675.00
Consumer Lending (w/Textbook or eBook)	07/10/23	10/27/23	16 Weeks	3	500.00	650.00
Introduction to Agricultural Lending	07/10/23	09/01/23	8 Weeks	3	475.00	575.00
Managing the Bank's Investment Portfolio	07/31/23	09/01/23	5 Weeks	3	875.00	1,125.00
Managing Funding, Liquidity and Capital	06/05/23	07/07/23	5 Weeks	3	875.00	1,125.00
Marketing in Banking	05/30/23	06/23/23	4 Weeks	15.0	300.00	375.00
ABA EXECUTIVE PROGRAMS						
CTFA Exam Online Prep (w/Textbook or eBook)			12 Weeks	3	1,570.00	1,920.00
Certificate in Bank Financial Management (Full Curriculum at a discount) All 4 courses below must be completed					2195.00	2895.00
Analyzing Bank Performance (w/Textbook)	05/15/23	06/30/23	7 Weeks	3	875.00	1,125.00
Managing the Bank's Investment Portfolio	07/31/23	09/01/23	5 Weeks	3	875.00	1,125.00
Managing Funding, Liquidity and Capital	06/05/23	07/07/23	7 Weeks	3	875.00	1,125.00
Managing Interest Rate Risk	04/10/23	06/02/23	8 Weeks	3	875.00	1,125.00



# INSTRUCTOR-LED ONLINE CLASSES

Course Title	Start Date	End Date	Length	Credits	Price (Member)	Price (Nonmember)
Accounting	05/15/23	07/31/23	12 Weeks	3	760.00	860.00
Accounting	07/31/23	10/16/23	12 Weeks	3	760.00	860.00
Accounting	09/11/23	11/27/23	12 Weeks	3	760.00	860.00
Analyzing Financial Statements	06/05/23	08/21/23	16 Weeks	3	760.00	860.00
Analyzing Financial Statements	07/31/23	10/16/23	16 Weeks	3	760.00	860.00
Analyzing Financial Statements	09/11/23	11/27/23	16 Weeks	3	760.00	860.00
Business Communication	05/01/23	07/17/23	12 Weeks	3	760.00	860.00
Business Communication	07/17/23	10/02/23	12 Weeks	3	760.00	860.00
Business Communication	09/11/23	11/27/23	12 Weeks	3	760.00	860.00
Business Math	05/08/23	07/24/23	12 Weeks	3	760.00	860.00
Business Math	06/26/23	09/11/23	12 Weeks	3	760.00	860.00
Business Math	08/07/23	10/23/23	12 Weeks	3	760.00	860.00
Business Math	09/18/23	12/04/23	12 Weeks	3	760.00	860.00
Commercial Lending	05/08/23	07/24/23	12 Weeks	3	760.00	860.00
Commercial Lending	07/17/23	10/02/23	12 Weeks	3	760.00	860.00
Commercial Lending	08/28/23	11/13/23	12 Weeks	3	760.00	860.00
Consumer Lending	05/08/23	07/24/23	12 Weeks	3	760.00	860.00
Consumer Lending	06/26/23	09/11/23	12 Weeks	3	760.00	860.00
Consumer Lending	08/07/23	10/23/23	12 Weeks	3	760.00	860.00
Customer Service Excellence	06/12/23	08/28/23	12 Weeks	2	695.00	795.00
Customer Service Excellence	08/14/23	10/30/23	12 Weeks	2	695.00	795.00
Deposit Account and Services	07/31/23	10/16/23	12 Weeks	2	695.00	795.00
Economics	05/01/23	07/17/23	12 Weeks	3	760.00	860.00
Economics	07/10/23	09/25/23	12 Weeks	3	760.00	860.00
Economics	09/18/23	12/04/23	12 Weeks	3	760.00	860.00
Financial Accounting	06/12/23	08/28/23	12 Weeks	3	760.00	860.00
Financial Accounting	08/14/23	10/30/23	12 Weeks	3	760.00	860.00
Human Relations	07/17/23	10/02/23	12 Weeks	3	760.00	860.00
Human Resource Management	07/10/23	09/25/23	12 Weeks	3	760.00	860.00
Human Resource Management	08/21/23	11/06/23	12 Weeks	3	760.00	860.00
Law and Banking: Applications	05/01/23	07/17/23	12 Weeks	3	760.00	860.00
Law and Banking: Applications	07/24/23	10/09/23	12 Weeks	3	760.00	860.00
Law and Banking: Applications	09/11/23	11/27/23	12 Weeks	3	760.00	860.00
Law and Banking: Principles	05/01/23	07/17/23	12 Weeks	3	760.00	860.00
Law and Banking: Principles	07/31/23	10/16/23	12 Weeks	3	760.00	860.00
Leading Your People to Success	06/05/23	08/21/23	12 Weeks	2	695.00	795.00
Management	07/10/23	09/25/23	12 Weeks	3	760.00	860.00
Marketing	05/22/23	08/07/23	12 Weeks	3	760.00	860.00
Marketing	07/17/23	10/02/23	12 Weeks	3	760.00	860.00
Marketing	08/21/23	11/06/2023	12 Weeks	3	760.00	860.00
Money and Banking	06/26/23	09/11/23	16 Weeks	3	760.00	860.00
Money and Banking	08/21/23	11/06/23	16 Weeks	3	760.00	860.00
Organizational Behavior	07/24/23	10/09/23	12 Weeks	3	760.00	860.00
Principles of Banking	05/01/23	07/17/23	12 Weeks	3	760.00	860.00
Principles of Banking	05/15/23	07/31/23	12 Weeks	3	760.00	860.00
Principles of Banking	06/05/23	08/21/23	12 Weeks	3	760.00	860.00
Principles of Banking	06/26/23	09/11/23	12 Weeks	3	760.00	860.00
Principles of Banking	07/24/23	10/09/23	12 Weeks	3	760.00	860.00
Principles of Banking	08/14/23	10/30/23	12 Weeks	3	760.00	860.00
Principles of Banking	08/28/23	11/13/23	12 Weeks	3	760.00	860.00
Principles of Banking	09/11/23	11/27/23	12 Weeks	3	760.00	860.00
Real Estate Appraisal	06/05/23	08/21/23	12 Weeks	3	760.00	860.00
Real Estate Finance	05/22/23	08/07/23	12 Weeks	3	760.00	860.00
Real Estate Law	06/12/23	08/28/23	12 Weeks	3	760.00	860.00

Course Title	Start Date	End Date	Length	Credits	Price (Member)	Price (Nonmember)
Residential Mortgage Lending	07/17/23	10/02/23	12 Weeks	3	760.00	860.00
Residential Mortgage Lending	09/11/23	11/27/23	12 Weeks	3	760.00	860.00
Teller Operations	05/22/23	08/07/23	12 Weeks	2	695.00	795.00
Teller Operations	07/24/23	10/09/23	12 Weeks	2	695.00	795.00
The Future of Business	09/11/23	11/27/23	12 Weeks	3	760.00	860.00
Selling Fundamentals	05/08/23	07/24/23	12 Weeks	3	760.00	860.00
Selling Fundamentals	07/24/23	10/09/23	12 Weeks	3	760.00	860.00
Statistics	06/12/23	08/28/23	12 Weeks	3	760.00	860.00
Supervision	06/26/23	09/11/23	12 Weeks	3	760.00	860.00

### CFT/MIAMI DADE COLLEGE MICROCOMPUTER ACADEMY

MICROSOFT OFFICE		
Microsoft Access – Level 1, 2 & 3	Hours may vary.	Prices may vary.
Microsoft Excel – Level 1, 2 & 3	Hours may vary.	Prices may vary.
Microsoft Office – Level 1, 2 & 3	Hours may vary.	Prices may vary.
Microsoft Outlook – Level 1, 2 & 3	Hours may vary.	Prices may vary.
Microsoft PowerPoint – Level 1, 2 & 3	Hours may vary.	Prices may vary.
Microsoft Word – Level 1, 2 & 3	Hours may vary.	Prices may vary.

#### IN HOUSE / ON-SITE TRAINING

### We can address virtually every training issue.

Let us put our expertise in solving training challenges to work for you. Our faculty is made up of seasoned, dynamic professionals with years of experience and expertise in the financial services industry. Whether you're looking to train a topic or a specific audience, CFT has the content and **Subject Matter Expert** to help you!

### Customization – focusing on your needs.

CFT's faculty would be glad to customize any program, focusing on your specific issues, moving right to the heart of your training needs.

#### It's hassles free and convenient.

We take care of the details and work with you every step of the way to make sure the training is just what you want it to be. We will present a program at a location and time that is most convenient for you and your staff, to include live virtual training.

#### ROI-It's a prudent training investment.

What better way to keep your staff at their peak than with specialized training presented by experts on the issues that matter most to you. The bottom-line payoffs are tremendous.

### ASSISTED SELF-STUDY & \*TESTING OUT

Assisted Self-Study: With assisted self-study, the student is expected to study on his/her own, yet he/she can contact an assigned instructor with any questions. Upon registering for a class, the student will receive a textbook, guidelines, and course assignments by chapter. The exams (usually a mid-term and a final) will be proctored by the student's supervisor or manager (or similar position) at his/her branch, department or other location convenient to both student and supervisor or manager. A CFT instructor, with expertise in the student's chosen course, will provide personal attention to the student whenever he/she requests it. The student will have phone and fax numbers, as well as an e-mail address when available, to communicate with his/her instructor. Upon completion of the class the student will receive a grade report. The grade will be based on all written work submitted for the course (exercises, quizzes, mid-term, final). A student may register for a self-study class at any time throughout the year. The registration form can be copied for multiple enrollments. The form must be completed in full, including the signatures of the student and a supervisor or manager who can approve the cost of the course.

A <u>\$100</u> drop fee applies for self-study courses. If a book has been sent, a textbook fee will also be charged. Any withdrawals received later than 7 days after materials have been mailed will be charged full tuition.

Students can request an extension for a fee of \$100.

Title	Tuition
Accounting	760.00
Accounting Basics	760.00
Analyzing Financial Statements	760.00
Bank Management	760.00
Business Communication	760.00
Business Ethics	695.00
Business Math	760.00
Commercial Lending	760.00
Communication Skills for Business	695.00
Consumer Lending	760.00
Contemporary Advertising	760.00
Customer Service Excellence	695.00
Customer Service Innovation	695.00
e-Commerce	760.00
Economics	760.00
Effective Business Writing	695.00
Employment & Labor Law	760.00
Financial Markets and Institutions	760.00
Financial Planning	760.00
Fraud Examination	760.00
Future of Business, The	760.00
Human Relations	760.00
Human Resource Development	760.00
Human Resource Management	760.00
Human Resource Selection	760.00

Title	Tuition
Interviewing and Hiring Techniques	515.00
International Financial Management	760.00
Law & Banking: Applications	760.00
Law & Banking: Principles	760.00
Leading Your People to Success	695.00
Management	760.00
Managing Change	695.00
Managing Performance & Productivity	695.00
Marketing	760.00
Money & Banking	760.00
Motivating Your Staff	515.00
Organizational Behavior	760.00
Principles of Banking	760.00
Project Management	695.00
Project Management: New Product Development	760.00
Project Management: Managerial Process	760.00
Real Estate Appraisal	760.00
Real Estate Finance	760.00
Real Estate Law	760.00
Residential Mortgage Lending	760.00
Sales Excellence	695.00
Selling Fundamentals	760.00
Statistics	760.00

Shipping/Handling Fee: \$27.00 Testing Out Study Tuition: \$95.00

Non-members add \$50.00 to Self-Study tuition and \$20.00 to Testing Out
Maximum time allowed for completion is 4-6 months
(Specific time noted on welcome letter –
Prices are subject to change without notice)

A webinar combines the clarity of an audio teleconference with the interactivity and visual presentation of the internet. All you need to participate is a telephone and an internet connection. You can still participate in the program, even if you do not have an Internet connection. Listening to the program over the telephone and following the written materials is JUST AS effective!

#### WEBINARS ARE COST-EFFECTIVE AND CONVENIENT!

No beating rush-hour traffic, no parking problems in fact, no travel time and expense at all! Just connect from your office, home or anywhere there is a touch-tone phone and/or an internet connection. Invite other listeners to your office to participate at no additional cost. You pay by the location, not by the person. With a speakerphone and/or a screen projector, you can train an entire group at once and for the same cost as training just one person.

#### WEBINARS ARE FAST-PACED AND INTERACTIVE!

You can ask questions, participate in live surveys and see the slides as the seminar leader presents the material.

#### **CAN'T ATTEND AT THE SCHEDULED TIME?**

No problem! Just purchase the program for future use. You will receive a recorded CD, written materials and website address. Plus, you can use these materials as many times and in as many departments or branches as you wish!

Call CFT for individual webinar flyers at (305) 237-3051

#### Attention Training Directors! Create your own learning library with CFT webinars multiple-purchase options.

CFT webinars cover just about any topic you need for group training, so next time you start to create your own training session from scratch, consider CFT webinars. You can use a webinar as the foundation of your own customized program...or, you can skip making your own program and just use the webinar instead.

#### **Attendance Options**

Live Plus Five (\$265) - Attend the live event and receive five business days of unlimited access to the OnDemand Playback and links to presenter materials and supplementary handouts.

OnDemand Recording (\$295) - Receive unlimited access to the OnDemand Playback for 6 months and links to presenter materials and supplementary handouts. This option does not include live session attendance.

CD-ROM (\$345) - Receive the webinar recording on a CD-ROM 7-10 business days after the Live event or your registration date (whichever is the latter). Receive unlimited access to the OnDemand Playback for 6 months and links to presenter materials and supplementary handouts. This option does not include live session attendance.

Live Plus Six (\$365) - Attend the live event and receive six months of unlimited access to the OnDemand Playback and links to presenter materials and supplementary handouts. Premier Package (\$395) - Includes all three base options. Live attendance, OnDemand Playback for six months, and the CD-ROM.

#### Have you seen our "NEW" Subscription Packages?

Looking for a fresh approach to your current training program? Want to assign and track training (no matter the format) all in one learning environment? A Webinar Subscription Service might be right for you!

#### SUBSCRIPTION PACKAGES

(Click above to learn more today!)

Webinar Tifle	Date	Time
Understanding the Basics of Cryptocurrency and Digital Assets	January,05, 2023	2:30PM
Mortgage Origination – 2 Part Series	January,06, 2023	11:00AM
Mortgage Origination – Part 1	January 06 ,2022	11:00AM
January Jumpstart for Supervisors	January 09 ,2023	2:30PM
You've Been Served: Best Practices in Processing Subpoenas, Garnishments and IRS Tax	January 10, 2023	11:00AM
FFIEC BSA/AML Exam Manual – 4 Part Series	January 10, 2023	2:30PM
FFIEC BSA/AML Exam Manual Part 4: Monetary Instrument Records, Funds Transfers and Morel	January 10, 2023	2:30PM
Utilizing Ratio Analysis to Determine Financial Strength	January 11, 2023	11:00AM
Mortgage Origination Part 2	January 11, 2023	2:30PM
Current Matters and Common Questions with the Call Report	January 12, 2023	11:00AM
8 Keys to Teller Excellence	January 12, 2023	2:30PM
Basic Accounting – 5 Part Series	January 13, 2023	11:00AM
Basic Accounting – Part 1	January 13, 2023	11:00AM
Right of Setoff (January)	January 17, 2023	11:00AM
New Accounts Study: A 4 Part Training (Series)	January 17, 2023	2:30PM
New Accounts Study – Part 2	January 17, 2023	2:30PM
New Accounts Study – Part 1	January 17, 2023	2:30PM
IRA Update – Annual Review	January 18, 2023	2:30PM
Regulation E: Error Resolution	January 18, 2023	11:00AM
Basic Real Estate Loan Documentation	January 19, 2023	11:00AM
Compliance Management	January 19, 2023	2:30PM
Basic Accounting – Part 2	January 20, 2023	11:00AM
Triple Play: O3s-Feedback-Coaching	January 23, 2023	2:30PM
Escrows	January 24, 2023	11:00AM
The UCC for Lenders	January 25, 2023	11:00AM
Hiring for the Right Fit	January 25, 2023	2:30PM
Health Savings Accounts	January 26, 2023	11:00AM
Creating the Right ERM Program for Your Community Bank	January 26, 2023	2:30PM

Bosic Accounting - Pert 3   January 27   January 27   January 31   January 32   January 33   January 31   J		Time
MMDA   January 31   January 31   January 31   January 31   January 31   Posting with Confidence: Social Media Compliance   February 01   Creating Interactive Spreadsheets   February 01   Ritto Advanced   February 02   Return of 18   Return of 1	, 2023	11:00AM
New Accounts Study - Part 3   January 31   Pebruary 01   February 01   February 01   February 01   February 01   February 02   February 02   February 02   February 03   February 04   February 05   February 06   February 06   February 06   February 06   February 07   February 08	, 2023	2:30PM
February Of Creating Interactive Spreadsheets   February Of Creating Schedules - Part 3	, 2023	11:00AM
Creating Interactive Spreadsheets   February OL	, 2023	2:30PM
RED Advanced	1, 2023	11:00AM
CRE Approisals: Components, Approaches to Value & Cap Rates  Basic Accounting – Part 4  February: 6  Ifte 4 C's of Exceptional Supervision  Lending Schedules – Part 1  February: 7  New Accounts Study – Part 4  February: 7  New Accounts Study – Part 4  February: 8  Basic Accounting – Part 5  Ribic Changed Circumstances & Loan Estimates  February: 8  TRID: Changed Circumstances & Loan Estimates  February: 9  TRID: Changed Circumstances & Loan Estimates  February: 9  TRID: Changed Circumstances & Loan Estimates  February: 16  February: 16  February: 16  February: 17  February: 18  February: 18  February: 18  February: 18  February: 19  Febru	1, 2023	2:30PM
Basic Accounting - Part 4   February 02		11:00AM
Ine 4 C's of Exceptional Supervision		2:30PM
Lending Schedules – 2 Part Series Lending Schedules – Part 1 Rebruary 07 New Accounts Study – Part 4 Basic Accounting – Part 5 Rebruary 07 RIBD: Changed Circumstances & Loan Estimates Lending Schedules – Part 2 RiBR Reporting – Annual Update Lending Schedules – Part 2 RiBR Reporting – Annual Update February 18 Reaporting – Annual Update February 18 February 19 Federal Benefit Payments Garnishment Requirements February 18 Basic Bankruptcy for Bankers February 18 Basic Bankruptcy for Bankers February 18 Reburd 19 Rebruary 20 Rebruary 19 Rebruary 20 Rebru		11:00AM
Lending Schedules - Part 1  Rebruary 07  Rewi Account Study - Part 4  Rebruary 08  Resic Accounting - Part 5  Rebruary 08  Resic Accounting - Part 5  Rebruary 08  Reside Accounting - Part 5  Rebruary 08  Responsing - Annual Update  Rebruary 18  Rebruary 18  Reporting - Annual Update  Rebruary 18  Responsing - Rebruary 19  Responsing - Responsing - Responsing - Rebruary 19  Responsing - Responsing - Responsing - Rebruary 19  Responsing - Responsing - Responsing - Responsing - Rebruary 19  Responsing - Responsin		2:30PM
New Accounts Study - Part 4   February 72   Basic Accounting - Part 5   February 78   February 79		11:00AM
Rabic Accounting - Part 5   February 08   February 18   February 18   February 18   February 19		11:00AM
IRID: Changed Circumstances & Loan Estimates		2:30PM
Lending Schedules - Part 2  IRA Reporting - Annual Update February 16 Federal Benefit Payments Garnishment Requirements February 14 Letters of Credit Basic Bankruptcy for Bankers February 15 Flood Insurance February 16 February 17 Flood Insurance February 18 February 18 Flood Insurance February 19 Maximize the Initial Call - Part 1 The Effective Selling System for Banking - A 4 Part Series February 17 The Effective Selling System for Banking - A 4 Part Series February 17 The Effective Selling System for Banking - A 4 Part Series February 17 The Effective Selling System for Banking - A 4 Part Series February 17 The Effective Selling System for Banking - A 4 Part Series February 17 What to do When a Customer Dies Characteristics of Strong Risk Assessments and Tools to Monitor and Report Results February 23 Short-Term Loan Structuring Using Net Working Investment Analysis February 23 Short-Term Loan Structuring Using Net Working Investment Analysis February 23 ANN February 27 Ann February 28 Ann February 28 Ann February 29 Ann February 20 An		11:00AM 2:30PM
RAR Reporting - Annual Update   February 12   Federal Benefit Payments Garnishment Requirements   February 14   February 15   Rosic Bankruptcy for Bankers   February 18   Rosic Bankruptcy for Bankers   February 18   Rosic Bankruptcy for Bankers   February 18   Rosic Bankruptcy for Bankers   February 19   Rosing Your Job of Head Teller   February 19   Rosing Your Job of Head Teller   February 19   Rosing Your Job of Head Teller   February 17   Rosic Bankruptcy 10   February 19   Februar		
Fedbruary 15		11:00AM 11:00AM
Letters of Credit Basic Bankruptcy for Bankers February 1.5 Rood Insurance February 1.6 Rood Insurance February 1.6 Rood Insurance February 1.6 Rood Insurance February 1.6 Rood Insurance February 1.7 Inbe Effective Selling System for Banking – A 4 Part Series February 1.7 Inbe Effective Selling System for Banking – A 4 Part Series February 1.7 ACH Rules Update February 1.7 ACH Rules Update February 2.7 Characteristics of Strong Risk Assessments and Tools to Monitor and Report Results February 2.3 Characteristics of Strong Risk Assessments and Tools to Monitor and Report Results February 2.3 Coverdrafts February 2.3 Overdrafts February 2.3 Overdrafts February 2.7 AN February 2.7 Are They Really a Prospect? – Part 2 An March 10.1, Marketing Advertising – 3 Part Series March 10.2, Marketing Advertising – 3 Part Series March 10.2, Marketing Advertising – Part 1 March 10.2, Residential Construction Lending March 10.2, Residential Construc		11:00AM
Bosic Bankruptcy for Bankers   February 15		11:00AM
Flobrulary Let   Natiling Your Job of Head Teller   February 16   February 16   February 16   February 16   February 17   The Effective Selling System for Banking – A 4 Part Series   February 17   The Effective Selling System for Banking – A 4 Part Series   February 17   The Effective Selling System for Banking – A 4 Part Series   February 12   What 1 to do When a Customer Dies   February 22   Characteristics of Strong Risk Assessments and Tools to Monitor and Report Results   February 23   Characteristics of Strong Risk Assessments and Tools to Monitor and Report Results   February 23   Characteristics of Strong Risk Assessments and Tools to Monitor and Report Results   February 23   Overdrafts   February 23   Overdrafts   February 24   February 24   February 25   February 27   February 27   February 27   Are They Really a Prospect? – Part 2   March 01, 2   March 02, 2   Residential Construction Lending   March 02, 2   Residential Construction Lending   March 06, 2   Residential Construction Lending   March 07, 2   Residential Construction Lending   March 08, 2   Residential Construction Lending   Residential Construction Lending   March 08, 2   Residential Construction Lending   Residential Construction Lending   Residential Constr		2:30PM
Natiling Your Job of Head Teller		11:00AM
Maximize the Initial Call — Part   February 17		2:30PM
The Effective Selling System for Banking – A 4 Part Series February 17 ACH Rules Update February 21 What 10 do When a Customer Dies Characteristics of Strong Risk Assessments and Tools to Monitor and Report Results February 23 Short-Term Loan Structuring Using Net Working Investment Analysis February 23 Overdrafts February 27 New Supervisor Essentials February 27 AAN Are They Really a Prospect? – Part 2 March 01, 2 Commercial Construction Lending Marketing Advertising – 3 Part Series March 01, 2 Marketing Advertising – Part 1 March 02, 2 HELOC – Deep Drive Residential Construction Lending March 06, 2 CECL and the Call Report March 08, 2 IRID IRA Beneficiary Payouts How to Create an Engaged Workforce March 13, 2 March 13, 2 March 13, 2 March 13, 2 March 15, 2 March 17, 2 Basic Excel for Accountants March 17, 2 Basic Excel for Accountants Ira Beneficiary Companient and Avoiding Fraud Loss Gain Clarity & Commitment with Your Prospect – Part 3 March 16, 2 A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders March 23, 2 ACH Basics & Refresher In Leadership – Part 2 March 17, 2 Basic Excel for Accountants In Leadership – Encouraging the Next Generation of Women Leaders March 23, 2 ACH Basics & Refresher March 23, 2 ACH Basics & Refresher March 23, 2 Active Shooter Prevention & Response March 23, 2 Active Shooter Prevention & Response Basic Cash Flow Analysis: EBIDA versus Uniform Cash Analysis Method March 28, 2 Basic Cash Flow Analysis: EBIDA versus Uniform Cash Analysis Method March 28, 2 Basic Cash Flow Analysis: EBIDA versus Uniform Cash Analysis Method March 29, 2 Basic Cash Flow Analysis: EBIDA versus Uniform Cash Analysis Method March 29, 2 Basic Cash Flow Analysis: EBIDA versus Uniform Cash Analysis Method March 29, 2 Basic Cash Flow Analysis: EBIDA versus Uniform Cash Analysis Method March 29, 2 Active Shooter Prevention & Response		11:00AM
ACH Rules Update What to do When a Customer Dies Characteristics of Strong Risk Assessments and Tools to Monitor and Report Results February 23 Short-Term Loan Structuring Using Net Working Investment Analysis February 23 Overdrafts February 23 New Supervisor Essentials February 23 Rew Supervisor Essentials February 24 ARN February 27 ARN February 27 ARN February 27 ARI Are They Really a Prospect? – Part 2 Commercial Construction Lending March 01, 2 Commercial Construction Lending March 01, 2 Morketing Advertising – 3 Part Series March 02, 2 HELOC – Deep Drive March 02, 2 Residential Construction Lending March 02, 2 Residential Construction Lending March 08, 2 Risila Construction Lending March 08, 2 Residential Construction Lending March 08, 2 Residential Construction Lending March 08, 2 Risila Resense March 09, 2 Are you Determined to Lead an Exceptional Branch? March 08, 2 Risila Resense March 09, 2 How to Create an Engaged Workforce March 13, 2 March 14, 2 March 15, 2 March 15, 2 March 15, 2 March 15, 2 March 16, 2 Gain Clarity & Commitment with Your Prospect – Part 3 March 16, 2 Gain Clarity & Commitment with Your Prospect – Part 3 March 16, 2 Residential Construction Lendership – Encouraging the Next Generation of Women Leaders March 16, 2 A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders March 20, 2 A Pession for Women in Leadership – Encouraging the Next Generation of Women Leaders March 20, 2 A Pession for Momen in Leadership – Encouraging the Next Generation of Women Leaders March 20, 2 A Pession for Momen in Leadership – Encouraging the Next Generation of Women Leaders March 20, 2 A Pession for March 2		11:00AM
What to do When a Customer Dies Characteristics of Strong Risk Assessments and Tools to Monitor and Report Results February 23 Short-Term Loan Structuring Using Net Working Investment Analysis Pebruary 24 New Supervisor Essentials February 24 New Supervisor Essentials February 24 AAN February 24 AAN February 25 Are They Really a Prospect? – Part 2 March 01, 2 Commercial Construction Lending March 01, 2 Commercial Construction Lending March 01, 2 Marketing Advertising – Part 1 March 02, 2 March 01, 2 ESSENTIAL CONSTRUCTION Analysis March 03, 2 ESSENTIAL CONSTRUCTION Analysis March 04, 2 ESSENTIAL CONSTRUCTION Analysis March 05, 2 ESSENTIAL CONSTRUCTION Analysis March 06, 2 ESSENTIAL CONSTRUCTION Analysis March 07, 2 Are you Determined to Lead an Exceptional Branch? March 08, 2 IRA Beneficiary Payouts March 09, 2 How to Create an Engaged Workforce March 09, 2 Marketing Advertising – Part 2 March 15, 2 Maraging a Successful Call Center Mire Transfers: Staying Compliant and Avoiding Fraud Loss Gain Clarity & Commitment with Your Prospect – Part 3 March 15, 2 Basic Excel for Accountants Legal Liabilities when Check Fraud Occurs A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders March 21, 2 AP Area on the March 23, 2 Area on Document Mistakes and How to Avoid Them March 23, 2 Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls March 23, 2 March 13, 2 Destruction Loan Documents March 23, 2 Destruction Loan Scaling He Details Active Shooter Prevention & Response March 28, 2 Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method March 28, 2 Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method April 04, 200 Bi-Monthly – April April 05, 200 Controlling the Risks of Power of Attorney Documents April 06, 200 Loan Coding and Risk Weightling April 06, 200 Loan Coding and Risk Weightling April 06, 200		11:00AM
Characteristics of Strong Risk Assessments and Tools to Monitor and Report Results  Short-Term Loan Structuring Using Net Working Investment Analysis  February 23  Overdrafts  February 27  New Supervisor Essentials  ARN  February 27  ARN  February 27  ARN  February 28  Are They Really a Prospect? – Part 2  Commercial Construction Lending  March 01, 2  Marketing Advertising – 3 Part Series  March 02, 2  HELOC – Deep Drive  March 02, 2  Residential Construction Lending  March 06, 2  Residential Construction Lending  March 07, 2  Are you Determined to Lead an Exceptional Branch?  IRA Beneficiary Payouts  March 08, 2  IRA Beneficiary Payouts  March 09, 2  March 09, 2  March 09, 2  March 09, 2  March 15, 2  Managing a Successful Call Center  Mire Transfers: Staying Compliant and Avoiding Fraud Loss  Gain Clarity & Commitment with Your Prospect – Part 3  March 15, 2  March 15, 2  A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders  March 21, 2  A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders  March 23, 2  Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls  March 23, 2  March 28, 2  March 29,		11:00AM
Short-Term Loan Structuring Using Net Working Investment Analysis  Overdrafts February 28  New Supervisor Essentials February 28  ARN February 28  ARCH 198  ARCH 01, 2  Marketing Advertising – Part 2  March 01, 2  Marketing Advertising – Part 1  March 02, 2  Residential Construction Lending March 02, 2  Residential Construction Lending March 06, 2  Residential Construction Lending March 06, 2  Residential Construction Lending March 08, 2  Residential Construction Lending March 09, 2  March 16, 2  March 16, 2  March 15, 2  March 15, 2  March 16, 2  Gain Clarity & Commitment with Your Prospect – Part 3  March 16, 2  Gain Clarity & Commitment with Your Prospect – Part 3  March 16, 2  Residential Construction Lendership – Encouraging the Next Generation of Women Leaders March 21, 2  A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders March 21, 2  ACH Basics & Refresher  Top Ten Loan Document Mistakes and How to Avoid Them March 23, 2  ACH Residential Construction Lending Response March 23, 2  Residential Construction Lending Response March 23, 2  Residential Construction Lending Response March 23, 2  Residential Construction Lending Residential Residential		2:30PM
Overdrafts New Supervisor Essentials AAN February 27 Are They Really a Prospect? – Part 2 March 01, 2 Commercial Construction Lending March 01, 2 Marketing Advertising – 3 Part Series March 02, 2 Marketing Advertising – Part 1 March 02, 2 Marketing Advertising – Part 1 March 02, 2 Residential Construction Lending March 02, 2 Residential Construction Lending March 06, 2 CECL and the Call Report March 07, 2 Are you Determined to Lead an Exceptional Branch? March 08, 2 IRID March 08, 2 HAN 10 Create an Engaged Workforce March 07, 2 How to Create an Engaged Workforce March 13, 2 Managing a Successful Call Center March 15, 2 Wire Transfers: Staying Compliant and Avoiding Fraud Loss March 16, 2 Gain Clarity & Commitment with Your Prospect – Part 3 March 17, 2 Basic Excel for Accountants Legal Liabilities when Check Fraud Occurs A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders March 21, 2 A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders March 22, 2 Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls March 23, 2 Understanding Commercial Loan Documents March 23, 2 March 23, 2 March 193, 2 March 24, 2 Marketing Advertising – Part 3 March 29, 2 Mar		2:30PM
New Supervisor Essentials  AAN  Are They Really a Prospect? – Part 2  March 01, 2  March 02, 2  Marketing Advertising – Part 1  March 02, 2  Residential Construction Lending  March 02, 2  Residential Construction Lending  March 06, 2  Residential Construction Lending  March 06, 2  Are you Determined to Lead an Exceptional Branch?  March 08, 2  IRA Beneficiary Payouts  March 08, 2  How to Create an Engaged Workforce  March 13, 2  March 13, 2  Managing a Successful Call Center  Wire Transfers: Staying Compilant and Avoiding Fraud Loss  Gain Clarity & Commitment with Your Prospect – Part 3  March 16, 2  Gain Clarity & Commitment with Your Prospect – Part 3  A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders  ACH Basics & Refresher  ACH Basics & Refresher  ACH Basics & Refresher  Anch 23, 2  Top Ten Loan Document Mistakes and How to Avoid Them  March 23, 2  Present to get a Decision – Part 4  March 23, 2  Present to get a Decision – Part 4  March 23, 2  Present to get a Decision – Part 4  March 28, 2  Active Shooter Prevention & Response  Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method  March 28, 2  Active Shooter Prevention & Response  Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method  March 28, 2  Bi-Monthly - 6 – Part Series  April 05, 202  Bi-Monthly - April  Accounting Beyond the Basics - 4 Part Series  April 05, 202  Accounting Beyond the Basics - 4 Part Series	4, 2023	11:00AM
AAN Are They Really a Prospect? – Part 2 Are They Really a Prospect? – Part 1 March 01., 2 Marketing Advertising – Part 1 March 02., 2 Residential Construction Lending Amarch 02., 2 Residential Construction Lending Amarch 03., 2 CECL and the Call Report Are you Determined to Lead an Exceptional Branch? Are to Create an Engaged Workforce Marketing Advertising – Part 2 March 13., 2 March 15., 2 Managing a Successful Call Center Wire Transfers: Staying Compliant and Avoiding Fraud Loss March 16., 2 Gain Clarity & Commitment with Your Prospect – Part 3 March 16., 2 Basic Excel for Accountants March 20., 2 Legal Liabilities when Check Fraud Occurs A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders March 21., 2 ACH Basics & Refresher Thee Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls March 23., 2 Top Ten Loan Document Mistakes and How to Avoid Them March 23., 2 Present to get a Decision – Part 4 March 24., 2 March 28., 2 Active Shooter Prevention & Response Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method March 28., 2 Active Shooter Prevention & Response Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method March 28., 2 Bi-Monthly - 6 – Part Series April 05., 202 Bi-Monthly - 6 – Part Series April 05., 202 Bi-Monthly - 6 Part Series April 05., 202 Bi-Monthly - April Accounting Beyond the Basics - 4 Part Series April 05., 202 Accounting Beyond the Basics - 4 Part Series		2:30PM
Commercial Construction Lending Marketing Advertising – 3 Part Series March 02, 2 Marketing Advertising – 3 Part Series March 02, 2 HELOC – Deep Drive March 02, 2 Residential Construction Lending March 02, 2 Residential Construction Lending March 06, 2 CECL and the Call Report March 06, 2 Are you Determined to Lead an Exceptional Branch? March 08, 2 IRA Beneficiary Payouts March 08, 2 IRA Beneficiary Payouts March 09, 2 March 10, 2 March 13, 2 March 13, 2 March 15, 2 Managing a Successful Call Center March 15, 2 Mire Transfers: Staying Compliant and Avoiding Fraud Loss March 16, 2 Gain Clarify & Commitment with Your Prospect – Part 3 March 17, 2 Basic Excel for Accountants Legal Liabilities when Check Fraud Occurs A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders ACH Basics & Refresher March 21, 2 A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders March 21, 2 ACH Basics & Refresher March 23, 2 Top Ten Loan Document Mistakes and How to Avoid Them March 23, 2 Understanding Commercial Loan Documents Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls March 23, 2 Understanding Commercial Loan Documents March 23, 2 Bi-Monthly – 6 – Part 4 March 28, 2 Bi-Monthly – 6 – Part Series April 03, 202 Bi-Monthly – April Accounting Beyond the Basics – 4 Part Series April 06, 202 Accounting Beyond the Basics – 4 Part Series	3, 2023	11:00AM
Marketing Advertising – 3 Part Series  Marketing Advertising – Part 1  March 02. 2  Marketing Advertising – Part 1  March 02. 2  Residential Construction Lending  March 06. 2  CECL and the Call Report  Are you Determined to Lead an Exceptional Branch?  IRA Beneficiary Payouts  IRA Beneficiary Payouts  March 08. 2  IRA Beneficiary Payouts  March 09. 2  How to Create an Engaged Workforce  March 13. 2  Marketing Advertising – Part 2  March 15. 2  Wire Transfers: Staying Compliant and Avoiding Fraud Loss  Gain Clarity & Commitment with Your Prospect – Part 3  March 17. 2  Basic Excel for Accountants  Legal Liabilities when Check Fraud Occurs  A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders  March 23. 2  ACH Basics & Refresher  Top Ten Loan Document Mistakes and How to Avoid Them  March 23. 2  Understanding Commercial Loan Documents  Present to get a Decision – Part 4  March 24. 2  March 26. 2  March 27. 2  March 28. 2  Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method  Construction Loans: Nailing the Details  March 28. 2  Bi-Monthly – April  April 03. 202  Controlling the Risks of Power of Attorney Documents  April 05. 202  Accounting Beyond the Basics – 4 Part Series  April 06. 202  Accounting Beyond the Basics – 4 Part Series	2023	11:00AM
March 02. 2 HELOC - Deep Drive March 02. 2 Residential Construction Lending March 06. 2 CECL and the Call Report March 07. 2 Are you Determined to Lead an Exceptional Branch? March 08. 2 IRID March 08. 2 IRA Beneficiary Payouts March 08. 2 IRA Beneficiary Payouts March 08. 2 March 09. 2 How to Create an Engaged Workforce March 13. 2 Marketing Advertising - Part 2 March 15. 2 Managing a Successful Call Center March 15. 2 Wire Transfers: Staying Compliant and Avoiding Fraud Loss March 16. 2 Gain Clarity & Commitment with Your Prospect - Part 3 March 17. 2 Basic Excel for Accountants March 20. 2 Legal Liabilities when Check Fraud Occurs A Passion for Women in Leadership - Encouraging the Next Generation of Women Leaders March 21. 2 ACH Basics & Refresher Top Ten Loan Document Mistakes and How to Avoid Them March 23. 2 Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls March 23. 2 Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls March 23. 2 March 23. 2 Active Shooter Prevention & Response Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method March 28. 2 Active Shooter Prevention & Response Basic Cash Riow Analysis: EBITDA versus Uniform Cash Analysis Method March 28. 2 Bi-Monthly - 6 - Part Series April 04, 202 Bi-Monthly - April Accounting Beyond the Basics - 4 Part Series April 06, 202 Accounting Beyond the Basics - 4 Part Series	2023	2:30PM
HELOC – Deep Drive Residential Construction Lending March 02, 2 Residential Construction Lending March 06, 2 CECL and the Call Report March 06, 2 Are you Determined to Lead an Exceptional Branch? March 08, 2 IRA Beneficiary Payouts March 08, 2 IRA Beneficiary Payouts March 09, 2 IRA Beneficiary Payouts March 13, 2 Marketing Advertising – Part 2 March 13, 2 Marketing Advertising – Part 2 March 15, 2 March 15, 2 Mire Transfers: Staying Compliant and Avoiding Fraud Loss March 16, 2 Gain Clarity & Commitment with Your Prospect – Part 3 March 16, 2 Gain Clarity & Commitment with Your Prospect – Part 3 March 17, 2 Basic Excel for Accountants Legal Liabilities when Check Fraud Occurs A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders March 21, 2 ACH Basics & Refresher Top Ten Loan Document Mistakes and How to Avoid Them March 23, 2 Top Ten Loan Document Mistakes and How to Avoid Them March 23, 2 Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls March 23, 2 Present to get a Decision – Part 4 March 23, 2 Marketing Advertising – Part 3 Active Shooter Prevention & Response Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method Construction Loans: Nailing the Details Ri and RC Anchor Schedules Bi-Monthly - 6 – Part Series April 04, 202 Bi-Monthly - 6 – Part Series April 05, 202 Bi-Monthly - April Controlling the Risks of Power of Attorney Documents April 06, 202 Accounting Beyond the Basics – 4 Part Series		11:00 AM
Residential Construction Lending CECL and the Call Report Are you Determined to Lead an Exceptional Branch? March 07, 2 Are you Determined to Lead an Exceptional Branch? March 08, 2 IRA Beneficiary Payouts March 08, 2 How to Create an Engaged Workforce March 13, 2 Marketing Advertising – Part 2 March 15, 2 Managing a Successful Call Center Mire Transfers: Staying Compliant and Avoiding Fraud Loss March 15, 2 Gain Clarity & Commitment with Your Prospect – Part 3 March 16, 2 Gain Clarity & Commitment with Your Prospect – Part 3 March 17, 2 Basic Excel for Accountants Legal Liabilities when Check Fraud Occurs A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders ACH Basics & Refresher ACH Basics & Refresher Top Ten Loan Document Mistakes and How to Avoid Them March 23, 2 Understanding Commercial Loan Documents Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls March 23, 2 Understanding Commercial Loan Documents Present to get a Decision – Part 4 March 23, 2 Marketing Advertising – Part 3 Active Shooter Prevention & Response Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method March 28, 2 Bi-Monthly - 6 – Part Series April 03, 202 Bi-Monthly - 6 – Part Series April 04, 202 Bi-Monthly - 6 – Part Series April 05, 202 Controlling the Risks of Power of Attorney Documents Accounting Beyond the Basics – 4 Part Series		11:00 AM
CECL and the Call Report  Are you Determined to Lead an Exceptional Branch?  IRID  March 08, 2  IRID  March 08, 2  IRA Beneficiary Payouts  How to Create an Engaged Workforce  March 13, 2  Marketing Advertising – Part 2  March 15, 2  Managing a Successful Call Center  March 15, 2  Mire Transfers: Staying Compliant and Avoiding Fraud Loss  Gain Clarity & Commitment with Your Prospect – Part 3  March 16, 2  Basic Excel for Accountants  Legal Liabilities when Check Fraud Occurs  A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders  March 21, 2  ACH Basics & Refresher  Iop Ten Loan Document Mistakes and How to Avoid Them  Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls  March 23, 2  Understanding Commercial Loan Documents  March 23, 2  Present to get a Decision – Part 4  March 28, 2  Active Shooter Prevention & Response  Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method  Construction Loans: Nailing the Details  RI and RC Anchor Schedules  Bi-Monthly - 6 – Part Series  April 03, 202  Bi-Monthly - 6 – Part Series  April 06, 202  Bi-Monthly - April  Controlling the Risks of Power of Attorney Documents  April 06, 202  Accounting Beyond the Basics – 4 Part Series  April 06, 202  Accounting Beyond the Basics – 4 Part Series		2:30 PM
Are you Determined to Lead an Exceptional Branch?  IRA Beneficiary Payouts  IRA Beneficiary Payouts  March 08, 2  How to Create an Engaged Workforce  March 13, 2  Marketing Advertising – Part 2  March 15, 2  Managing a Successful Call Center  Wire Transfers: Staying Compliant and Avoiding Fraud Loss  Gain Clarity & Commitment with Your Prospect – Part 3  March 16, 2  Basic Excel for Accountants  Legal Liabilities when Check Fraud Occurs  A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders  March 21, 2  ACH Basics & Refresher  Top Ten Loan Document Mistakes and How to Avoid Them  Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls  March 23, 2  Present to get a Decision – Part 4  March 24, 2  Marketing Advertising – Part 3  Active Shooter Prevention & Response  Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method  Construction Loans: Nailing the Details  RI and RC Anchor Schedules  Bi-Monthly - 6 – Part Series  Bi-Monthly - 6 – Part Series  April 05, 202  Accounting Beyond the Basics – 4 Part Series  April 06, 202  Accounting Beyond the Basics – 4 Part Series  April 07, 202  Accounting Beyond the Basics – 4 Part Series  April 07, 202  Accounting Beyond the Basics – 4 Part Series		2:30PM
IRID March 08, 2 IRA Beneficiary Payouts March 09, 2 How to Create an Engaged Workforce March 13, 2 Marketing Advertising – Part 2 March 15, 2 Wine Transfers: Staying Compliant and Avoiding Fraud Loss March 16, 2 Gain Clarity & Commitment with Your Prospect – Part 3 March 16, 2 Gain Clarity & Commitment with Your Prospect – Part 3 March 17, 2 Basic Excel for Accountants March 20, 2 Legal Liabilities when Check Fraud Occurs March 21, 2 A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders March 21, 2 ACH Basics & Refresher March 23, 2 Top Ten Loan Document Mistakes and How to Avoid Them March 23, 2 Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls March 23, 2 Understanding Commercial Loan Documents March 23, 2 Present to get a Decision – Part 4 March 24, 2 Marketing Advertising – Part 3 March 28, 2 Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method March 30, 2 Construction Loans: Nailing the Details April 03, 202 RI and RC Anchor Schedules April 05, 202 Bi-Monthly – A Part Series April 05, 202 Bi-Monthly – A Part Series April 05, 202 Loan Coding and Risk Weighting April 06, 202 Accounting Beyond the Basics – 4 Part Series April 07, 202 Accounting Beyond the Basics – 4 Part Series April 07, 202 Accounting Beyond the Basics – 4 Part Series		11:00AM
IRA Beneficiary Payouts How to Create an Engaged Workforce March 13, 2 Marketing Advertising – Part 2 Managing a Successful Call Center March 15, 2 Managing a Successful Call Center March 15, 2 Mire Transfers: Staying Compliant and Avoiding Fraud Loss March 16, 2 Gain Clarity & Commitment with Your Prospect – Part 3 March 17, 2 Basic Excel for Accountants Legal Liabilities when Check Fraud Occurs A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders March 21, 2 ACH Basics & Refresher Top Ten Loan Document Mistakes and How to Avoid Them March 23, 2 Intree Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls March 23, 2 Understanding Commercial Loan Documents March 23, 2 March 24, 2 Marketing Advertising – Part 3 March 28, 2 Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method March 28, 2 Bi-Monthly – 6 – Part Series March 20, 20 Bi-Monthly – April Controlling the Risks of Power of Attorney Documents April 05, 202 Loan Coding and Risk Weighting April 06, 202 Loan Coding and Risk Weighting April 07, 202 Accounting Beyond the Basics – 4 Part Series April 07, 202 Accounting Beyond the Basics – 4 Part Series		11:00AM
How to Create an Engaged Workforce March 13, 2 Marketing Advertising – Part 2 March 15, 2 Managing a Successful Call Center Mire Transfers: Staying Compliant and Avoiding Fraud Loss March 16, 2 Gain Clarity & Commitment with Your Prospect – Part 3 March 17, 2 Basic Excel for Accountants Legal Liabilities when Check Fraud Occurs A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders March 21, 2 ACH Basics & Refresher March 23, 2 Top Ten Loan Document Mistakes and How to Avoid Them March 23, 2 Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls March 23, 2 Understanding Commercial Loan Documents Present to get a Decision – Part 4 March 24, 2 Marketing Advertising – Part 3 Active Shooter Prevention & Response Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method Construction Loans: Nailing the Details RI and RC Anchor Schedules Bi-Monthly – 6 – Part Series Bi-Monthly – 6 – Part Series Bi-Monthly – April Controlling the Risks of Power of Attorney Documents April 05, 202 Accounting Beyond the Basics – 4 Part Series April 07, 202 Accounting Beyond the Basics – 4 Part Series		2:30PM
Marketing Advertising – Part 2  Managing a Successful Call Center  March 15, 2  Wire Transfers: Staying Compliant and Avoiding Fraud Loss  Gain Clarity & Commitment with Your Prospect – Part 3  Basic Excel for Accountants  Legal Liabilities when Check Fraud Occurs  A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders  March 21, 2  ACH Basics & Refresher  Top Ten Loan Document Mistakes and How to Avoid Them  March 23, 2  Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls  March 23, 2  Understanding Commercial Loan Documents  Present to get a Decision – Part 4  March 24, 2  Marketing Advertising – Part 3  Active Shooter Prevention & Response  Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method  Construction Loans: Nailing the Details  RI and RC Anchor Schedules  Bi-Monthly – 6 – Part Series  Bi-Monthly – 6 – Part Series  Bi-Monthly – April  Controlling the Risks of Power of Attorney Documents  April 06, 202  Accounting Beyond the Basics – 4 Part Series  April 07, 202		11:00AM 2:30PM
Managing a Successful Call Center  Wire Transfers: Staying Compliant and Avoiding Fraud Loss  Gain Clarity & Commitment with Your Prospect – Part 3  Basic Excel for Accountants  Legal Liabilities when Check Fraud Occurs  A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders  ACH Basics & Refresher  Top Ten Loan Document Mistakes and How to Avoid Them  Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls  Understanding Commercial Loan Documents  Present to get a Decision – Part 4  March 23, 2  Marketing Advertising – Part 3  Active Shooter Prevention & Response  Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method  Construction Loans: Nailing the Details  RI and RC Anchor Schedules  Bi-Monthly – 6 – Part Series  Bi-Monthly – April  April 05, 202  Loan Coding and Risk Weighting  April 06, 202  Accounting Beyond the Basics – 4 Part Series  April 07, 202  April 06, 202  April 07, 202		11:00AM
Wire Transfers: Staying Compliant and Avoiding Fraud Loss Gain Clarity & Commitment with Your Prospect – Part 3  Basic Excel for Accountants Legal Liabilities when Check Fraud Occurs A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders ACH Basics & Refresher Top Ten Loan Document Mistakes and How to Avoid Them March 23, 2 Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls March 23, 2 Understanding Commercial Loan Documents Present to get a Decision – Part 4 Marketing Advertising – Part 3 Active Shooter Prevention & Response Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method Construction Loans: Nailing the Details RI and RC Anchor Schedules Bi-Monthly – 6 – Part Series April 05, 202 Bi-Monthly – April Controlling the Risks of Power of Attorney Documents April 06, 202 Accounting Beyond the Basics – 4 Part Series April 07, 202		2:30PM
Gain Clarity & Commitment with Your Prospect – Part 3  Basic Excel for Accountants  Legal Liabilities when Check Fraud Occurs  A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders  ACH Basics & Refresher  Top Ten Loan Document Mistakes and How to Avoid Them  March 23, 2  Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls  Understanding Commercial Loan Documents  Present to get a Decision – Part 4  March 24, 2  Marketing Advertising – Part 3  Active Shooter Prevention & Response  Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method  Construction Loans: Nailing the Details  RI and RC Anchor Schedules  Bi-Monthly – April  Controlling the Risks of Power of Attorney Documents  April 06, 202  Loan Coding and Risk Weighting  April 06, 202  April 07, 202		11:00AM
Basic Excel for Accountants Legal Liabilities when Check Fraud Occurs A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders March 21, 2 ACH Basics & Refresher March 23, 2 Top Ten Loan Document Mistakes and How to Avoid Them March 23, 2 Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls March 23, 2 Understanding Commercial Loan Documents March 23, 2 Present to get a Decision – Part 4 Marketing Advertising – Part 3 March 28, 2 Active Shooter Prevention & Response Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method Construction Loans: Nailing the Details RI and RC Anchor Schedules Bi-Monthly - 6 – Part Series April 05, 202 Bi-Monthly – April Controlling the Risks of Power of Attorney Documents April 06, 202 Accounting Beyond the Basics – 4 Part Series April 07, 202		11:00AM
Legal Liabilities when Check Fraud Occurs  A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders  March 21, 2  ACH Basics & Refresher  Top Ten Loan Document Mistakes and How to Avoid Them  March 23, 2  Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls  March 23, 2  Understanding Commercial Loan Documents  March 23, 2  Present to get a Decision – Part 4  Marketing Advertising – Part 3  Active Shooter Prevention & Response  Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method  Construction Loans: Nailing the Details  RI and RC Anchor Schedules  Bi-Monthly - 6 – Part Series  April 05, 202  Bi-Monthly - April  Controlling the Risks of Power of Attorney Documents  April 06, 202  Loan Coding and Risk Weighting  April 06, 202  Accounting Beyond the Basics - 4 Part Series  March 21, 2  March 22, 2  March 23, 2  March 23, 2  March 23, 2  March 24, 2  March 24, 2  March 24, 2  March 26, 2  March 28, 2		2:30 PM
A Passion for Women in Leadership – Encouraging the Next Generation of Women Leaders  ACH Basics & Refresher  Top Ten Loan Document Mistakes and How to Avoid Them  March 23, 2  Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls  Understanding Commercial Loan Documents  Present to get a Decision – Part 4  March 23, 2  Marketing Advertising – Part 3  Active Shooter Prevention & Response  Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method  Construction Loans: Nailing the Details  RI and RC Anchor Schedules  Bi-Monthly – 6 – Part Series  April 05, 202  Bi-Monthly – April  Controlling the Risks of Power of Attorney Documents  April 06, 202  Accounting Beyond the Basics – 4 Part Series  April 07, 202		11:00AM
ACH Basics & Refresher  Top Ten Loan Document Mistakes and How to Avoid Them  March 23, 2  Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls  March 23, 2  Understanding Commercial Loan Documents  Present to get a Decision – Part 4  March 24, 2  Marketing Advertising – Part 3  Active Shooter Prevention & Response  Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method  Construction Loans: Nailing the Details  RI and RC Anchor Schedules  Bi-Monthly – 6 – Part Series  Bi-Monthly – April  Controlling the Risks of Power of Attorney Documents  Loan Coding and Risk Weighting  Accounting Beyond the Basics – 4 Part Series  March 23, 2  March 23, 2  March 23, 2  March 24, 2  March 24, 2  March 28, 2  March 29, 2  Mar		2:30 PM
Top Ten Loan Document Mistakes and How to Avoid Them  Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls  Understanding Commercial Loan Documents  Present to get a Decision – Part 4  March 23, 2  Marketing Advertising – Part 3  Active Shooter Prevention & Response  Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method  Construction Loans: Nailing the Details  RI and RC Anchor Schedules  Bi-Monthly – 6 – Part Series  Bi-Monthly – April  Controlling the Risks of Power of Attorney Documents  Loan Coding and Risk Weighting  Accounting Beyond the Basics – 4 Part Series  March 23, 2  March 23, 2  March 28, 2  March 29, 2  M		11:00 AM
Three Key Risk Assessments in Your ERM Program: ERM, IT, and Internal Controls  Understanding Commercial Loan Documents  Present to get a Decision – Part 4  March 24, 2  Marketing Advertising – Part 3  Active Shooter Prevention & Response  Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method  Construction Loans: Nailing the Details  RI and RC Anchor Schedules  Bi-Monthly – 6 – Part Series  Bi-Monthly – April  Controlling the Risks of Power of Attorney Documents  Loan Coding and Risk Weighting  Accounting Beyond the Basics – 4 Part Series  March 23, 2  March 23, 2  March 24, 2  March 28, 2  March 29, 2  Mar		11:00 AM
Present to get a Decision – Part 4  March 24, 2  Marketing Advertising – Part 3  Active Shooter Prevention & Response  Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method  Construction Loans: Nailing the Details  RI and RC Anchor Schedules  Bi-Monthly - 6 – Part Series  Bi-Monthly – April  Controlling the Risks of Power of Attorney Documents  Loan Coding and Risk Weighting  Accounting Beyond the Basics – 4 Part Series  March 24, 2  March 24, 2  March 24, 2  March 28, 2  March 29, 2  April 03, 202  April 05, 202  April 06, 202  Accounting Beyond the Basics – 4 Part Series  April 07, 202  April 07, 202	2023	2:30 PM
Marketing Advertising – Part 3  Active Shooter Prevention & Response  Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method  Construction Loans: Nailing the Details  RI and RC Anchor Schedules  Bi-Monthly - 6 – Part Series  Bi-Monthly – April  Controlling the Risks of Power of Attorney Documents  Loan Coding and Risk Weighting  Accounting Beyond the Basics – 4 Part Series  March 28, 2  March 28, 2  April 03, 202  April 03, 202  April 04, 202  April 05, 202  April 06, 202  Accounting Beyond the Basics – 4 Part Series  April 07, 202		2:30 PM
Active Shooter Prevention & Response  Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method  Construction Loans: Nailing the Details  RI and RC Anchor Schedules  Bi-Monthly - 6 – Part Series  Bi-Monthly – April  Controlling the Risks of Power of Attorney Documents  Loan Coding and Risk Weighting  Accounting Beyond the Basics – 4 Part Series  March 28, 28  April 03, 202  April 04, 202  April 05, 202  April 06, 202  Accounting Beyond the Basics – 4 Part Series  March 28, 2		11:00AM
Basic Cash Flow Analysis: EBITDA versus Uniform Cash Analysis Method  Construction Loans: Nailing the Details  RI and RC Anchor Schedules  Bi-Monthly - 6 - Part Series  April 05, 202  Bi-Monthly - April  Controlling the Risks of Power of Attorney Documents  Loan Coding and Risk Weighting  Accounting Beyond the Basics - 4 Part Series  March 30, 202  April 03, 202  April 05, 202  April 06, 202  April 07, 202  April 07, 202		11:00AM
Construction Loans: Nailing the Details  RI and RC Anchor Schedules  Bi-Monthly - 6 - Part Series  April 05, 202  Bi-Monthly - April  Controlling the Risks of Power of Attorney Documents  Loan Coding and Risk Weighting  Accounting Beyond the Basics - 4 Part Series  April 03, 202  April 04, 202  April 05, 202  April 06, 202  April 07, 202  April 07, 202		2:30PM
RI and RC Anchor Schedules  Bi-Monthly - 6 - Part Series  April 05, 202  Bi-Monthly - April  Controlling the Risks of Power of Attorney Documents  Loan Coding and Risk Weighting  Accounting Beyond the Basics - 4 Part Series  April 04, 202  April 05, 202  April 06, 202  April 07, 202  April 07, 202		11:00AM
Bi-Monthly - 6 - Part Series April 05, 202 Bi-Monthly - April April April 05, 202 Controlling the Risks of Power of Attorney Documents April 06, 202 Loan Coding and Risk Weighting April 06, 202 Accounting Beyond the Basics - 4 Part Series April 07, 202		2:30PM
Bi-Monthly – April April O5, 202  Controlling the Risks of Power of Attorney Documents April 06, 202  Loan Coding and Risk Weighting April 06, 202  Accounting Beyond the Basics – 4 Part Series April 07, 202		11:00AM
Controlling the Risks of Power of Attorney Documents  Loan Coding and Risk Weighting  April 06, 202  Accounting Beyond the Basics – 4 Part Series  April 07, 202		11:00AM
Loan Coding and Risk Weighting April 06, 202 Accounting Beyond the Basics – 4 Part Series April 07, 202		11:00AM
Accounting Beyond the Basics – 4 Part Series April 07, 202		11:00AM 2:30PM
		11:00AM
LACCOUNTED DEVONOUNE BOSICS - POULT		11:00AM
Onboarding Your New Hire April 11, 202		11:00AM
BSA/AML – 3 Part Series April 12, 202		11:00AM
BSA/AML – ST dit Series April 12, 202  BSA/AML – Part 1 April 12, 202		11:00AM
Minimize Spreadsheet Errors April 12, 202		2:30PM

Webinar Title	Date	Time
Loan Participations	April 13, 2023	11:00AM
Commercial Loan Defaults: Waivers, Workouts and Amendments	April 13, 2023	2:30PM
Accounting Beyond the Basics – Part 2	April 14, 2023	11:00AM
Commercial & Business Lending Basics for Support Personnel	April 17, 2023	2:30PM
Overdrafts	April 18, 2023	11:00AM
Commercial Loan Compliance	April 19, 2023	11:00AM
Understanding Revocable and Irrevocable Trust Documents	April 20, 2023	11:00AM
Secrets to Being a Great Call Center Agent  Accounting Beyond the Basics – Part 3	April 20, 2023 April 21, 2023	2:30PM 11:00AM
BSA/AML Part 2	April 27, 2023 April 27, 2023	11:00AM
Adding the "WOW" Factor to Credit Analysis	April 27, 2023	2:30PM
Accounting Beyond the Basics – Part 4	April 28, 2023	11:00AM
CRE Lending: Cash Flow Analysis & Cap Rates	May 01, 2023	2:30PM
New Accounts – 3 Part Series	May 02, 2023	11:00AM
New Accounts – Part 1	May 02, 2023	11:00AM
New Accounts – Part 2	May 03, 2023	11:00AM
Elder Financial Exploitation	May 03, 2023	2:30PM
New Accounts – Part 3	May 04, 2023	11:00AM
Call Report for Beginners – 5 Part Series	May 05, 2023	11:00AM
Call Report for Beginners – Part 1	May 05, 2023	11:00AM
Employee Engagement & Retention Strategies	May 08, 2023	2:30PM
BSA/AML Part 3  Coaching Tellers to Excellence	May 10, 2023 May 11, 2023	11:00AM 2:30PM
Call Report for Beginners – Part 2	May 12, 2023	11:00AM
Dormant Accounts	May 17, 2023	11:00AM
Writing An Effective Credit Memorandum That Tells the Full Story	May 17, 2023	2:30PM
Dealing with Appraisals	May 18, 2023	11:00AM
CRE Lending: Property Types, Lease Structures and Other Non-Financial Risks	May 18, 2023	2:30 PM
Call Report for Beginners – Part 3	May 19, 2023	11:00AM
ACH Origination	May 23, 2022	11:00AM
Loan Modifications	May 23, 2022	2:30PM
Fair Lending	May 24, 2023	11:00AM
Minimize Spreadsheet Errors	May 24, 2023	2:30PM
Defaulted Mortgages	May 25, 2023	11:00 AM
Call Report for Beginners – Part 4	May 26, 2023	11:00 AM
Controlling a Borrower's Business Without Taking Control Through the Loan Agreement Call Report for Beginners – Part 5	May 31, 2023 June 02, 2023	11:00 AM 11:00AM
Understanding the Basics of the Flood Disaster Protection Act	June 05, 2023	2:30PM
Notary Public	June 06, 2023	11:00AM
Bi-Monthly - June	June 07, 2023	11:00AM
Financial Reporting	June 07, 2023	2:30 PM
The Role of Board Secretary	June 08, 2023	11:00 AM
Creating Exceptional Customer Experiences	June 08, 2023	2:30PM
CRE Appraisals: Regulations and the Review Process	June 12, 2023	2:30 PM
Treasury Management: A Powerful Tool to Increase Deposits and Fee Income	June 15, 2023	2:30 PM
TRID Hot Spots	June 20, 2023	11:00AM
Branch Manager Best Practices	June 21, 2023	11:00AM
Vendor Management  CRE Appraisals: Components, Approaches to Value & Cap Rates	June 23, 2023	11:00AM 2:30 PM
Records Management	June 26, 2023 June 29, 2023	11:00AM
Commercial Lending Risks, Rewards, Controls & Common Mistakes	June 29, 2023	2:30PM
You've Been Served: Best Practices in Processing Subpoenas, Garnishments, and IRS Tax	July 11, 2023	11:00AM
Levies	, .	
Cannabis Banking Utilizing Technology for the Compliance Officer	July 12, 2023 July 12, 2023	11:00AM 2:30PM
Safe Deposit Box	July 13, 2023	11:00AM
InfoSec and Privacy	July 17, 2023	2:30PM
Right of Setoff	July 18, 2023	11:00AM
8 Keys to Teller Excellence	July 20, 2023	2:30PM
Robbery Basics & Beyond	July 25, 2023	11:00AM
Introduction to Spreadsheets	July 26, 2023	2:30PM
Bi-Monthly – August	August 01, 2023	11:00AM
TRID for Beginners	August 02, 2023	11:00AM
Total TRID Training – 4 Part Series	August 07, 2023	2:30PM
Total TRID Training – Part 1	August 07, 2023	2:30PM
Advertising Compliance	August 08, 2023	11:00AM
Total TRID Training – Part 2 Compliance for Beginners	August 08, 2023 August 09, 2023	2:30PM 11:00AM
Total TRID Training – Part 3	August 09, 2023	2:30PM
Total rate trailing - rate o	/ NUGUSI U/, ZUZS	Z.JUI IVI

Webinar Title	Date	Time
Account Basics – 5 Part Series	August 10, 2023	11:00AM
Account Basics - Part 1	August 10, 2023	11:00AM
Total TRID Training – Part 4	August 10, 2023	2:30PM
Code of Ethics	August 14, 2023	2:30PM
Account Basics – Part 2	August 15, 2023	11:00AM
Federal Benefit Payments Garnishment Requirements	August 17, 2023	11:00AM
Nailing Your Job of Head Teller	August 17, 2023	2:30PM
Account Basics – Part 3	August 18, 2023	11:00AM
Account Basics – Part 4	August 23, 2023	11:00AM
Deposit and Operations Compliance	August 23, 2023	11:00AM
Diversity & Inclusion in our Workplace	August 24, 2023	11:00AM
Reviewing Loans and Mending Fences Before the Regulators Come	August 24, 2023	2:30 PM
Account Basics – Part 5	August 25, 2023	11:00AM
What to do When a Customer Dies	August 29, 2023	11:00AM
Posting with Confidence: Social Media Compliance	August 30, 2023	11:00AM
Mortgage Servicing – 2 Part Series	September 01, 2023	11:00AM
Mortgage Servicing – Part 1	September 01, 2023	11:00AM
RC-R – 2 Part Services	September 06, 2023	2:30 PM
RC-R – Part 1	September 06, 2023	2:30 PM
Managing Your ACH Exceptions	September 07, 2023	11:00AM
RC-R – Part 2	September 07, 2023	2:30PM
Commercial Construction Lending	September 11, 2023	2:30PM
Mortgage Servicing – Part 2	September 12, 2023	2:30PM
Auditing for Compliance	September 13, 2023	11:0 AM
IRA – 4 Part Series	September 14, 2023	11:00AM
IRA – Part 1 – The Basics	September 14, 2023	11:00AM
Managing a Successful Call Center	September 14, 2023	2:30PM
Digital Banking Issues	September 19, 2023	11:00AM
Legal Liabilities when Check Fraud Occurs	September 19, 2023	2:30PM
Speed Tips	September 20, 2023	2:30PM
Financial Statements Mapping: Essentials of Financial Statement Analysis & How They are Used in Ratio and Cash Flow Analysis	September 21, 2023	11:00AM
Legal Essential: What Every Lender Needs to Know	September 23, 2023	11:00AM
Securing Your Collateral	September 26, 2023	2:30 PM
TRID Construction	September 26, 2023	2:30 PM
Understanding Commercial Real Estate Loan Documents	September 27, 2023	11:00AM
Escrows	September 28, 2023	11:00AM
Controlling the Risks of Power of Attorney Documents	October 03, 2023	11:00AM
Bi-Monthly – October	October 04, 2023	11:00AM
IRA – Part 2 – Rollovers	October 05, 2023	11:00AM
Know the Five Steps in Commercial Loan Documentation: to Ensure Collateral Attachment and Perfection	October 06, 2023	11:00AM
Understanding Revocable and Irrevocable Trust Document	October 10, 2023	11:00AM
Loan Coding and Risk Weighting	October 10, 2023	2:30 PM
Current Matters and Common Questions with the Call Report	October 11, 2023	11:00AM

### **SUMMER CLASSES ARE HERE!**

Want to go to grow and continue your education, but not sure where to begin?

Contact CFT to schedule a personalized evaluation and review the many programs, certificates and degrees that are available to you!

We are here to help you every step of the way. Don't wait & contact us today.

claguna@mdc.edu www.cftintl.org 305.237.3051



# **CREDIT UNION WEBINAR SCHEDULE**

#### Attendance Options

Live Plus Five (\$195) - Attend the live event and receive five business days of unlimited access to the OnDemand Playback and links to presenter materials and supplementary handouts.

OnDemand Recording (\$215) - Receive unlimited access to the OnDemand Playback for 6 months and links to presenter materials and supplementary handouts. This option does not include live session attendance.

CD-ROM (\$245) - Receive the webinar recording on a CD-ROM 7-10 business days after the Live event or your registration date (whichever is the latter). Receive unlimited access to the OnDemand Playback for 6 months and links to presenter materials and supplementary handouts. This option does not include live session attendance.

Live Plus Six (\$265) - Attend the live event and receive six months of unlimited access to the OnDemand Playback and links to presenter materials and supplementary handouts.

Premier Package (\$295) - Includes all three base options. Live attendance, OnDemand Playback for six months, and the CD-ROM.

#### Have you seen our "NEW" Subscription Packages?

Looking for a fresh approach to your current training program? Want to assign and track training (no matter the format) all in one learning environment? A Webinar Subscription Service might be right for you!

#### **SUBSCRIPTION PACKAGES**

(Click above to learn more today!)

Webinar Title	Date	Time				
IRA Update – Annual Review	January 18, 2023	11:00AM				
Creating the Right ERM Program for Your Credit Union	February 02, 2023	11:00 AM				
Managing a Successful Call Center	February 09, 2023	2:30PM				
Consumer Real Estate Documentation	March 07, 2023	11:00AM				
Board Secretary	April 11, 2023	11:00AM				
Characteristics of Strong Risk Assessments and Tools to	April 11, 2023	2:30PM				
Secrets to Being a Great Call Center Agent	May 18, 2023	2:30PM				
Strategies for Succession Planning and Talent	May 23, 2023	11:00AM				
Dormant Accounts	September 19, 2023	2:30PM				
Creating Exceptional Member Service Experiences	October 12, 2023	2:30PM				
MORE TITLES & DATES TO BE ANNOUNCED SOON!						

#### **The Directors Education Series**

The responsibility and liability of the Bank Director is ever increasing. It is critical your Directors stay current with the training to help them through the complexities of today's banking environment.

The Directors Education Series<sup>™</sup> is a Library of training courses focused on the role and expectations of the Bank Director's conduct, duties and liabilities. Our programs have been authored by a group of highly recognized, respected industry experts. Your subscription to this series will assist you with the responsibility you have to educate those who serve on your Board.

One annual subscription provides your financial institution access to our entire course library. For more information, please contact the CFT office at 305.237.3051 or email us at <a href="claguna@mdc.edu">claguna@mdc.edu</a>.

#### **FEATURES:**



60+ courses available 24/7



20-25 minutes in length (perfect for board meetings)





Course contains audio, video & PowerPoint



Handouts and discussion questions available for download



Course/user tracking and reporting



Accessible from any device



**Printable Certificates** 

CFT/ABA's self-paced online course library of cost-effective banking, business, and trust courses deliver concepts that can be immediately applied on the job. ABA eLearning provides enhanced support with tools like our unique, role-based training roadmaps that guide users through a proven training path; blended learning extensions that enable immediate facilitated practice and application of learning in a classroom environment; and world-class implementation support that ensures the success of your training program. Enroll for individual courses, sets of courses offered as certificates, or contact us for contract pricing (bank-wide license). Please be advised that there is a \$14.00 individual registration fee for all eLearning classes.

Course Name	Member	Non-Member	Hrs.	Credit HRS	ICB
		<b>BUSINESS BANKIN</b>	G & COMMER	CIAL LENDING	
GENERAL					
ABA Certificate in Business and Commercial Lending (UPDATED)	\$1295	\$1595	33	2.00	3.75 CERP (self-paced)
ABA Small Business Banker Certificate Curriculum	\$495	\$695	11	0.50	1.5 CFMP, 3.75 CSOP, 11 CTFA
Analyzing Business Financial Statements and Tax Returns Suite	\$275	\$375	7	0.50	8.75 CLBB
Analyzing Personal Financial Statements and Tax Returns Suite	\$275	\$375	6	0.50	7.25 CLBB
Effective Commercial Loan Write- ups	\$135	\$185	0.40		1.0 CLBB
Fundamentals of Small Business Banking Suite	\$95	\$130	0.45	0.00	N/A
Introduction to Analyzing Financial Statements	\$95	\$130	3.15	0.00	3.75 CLBB, CSOP, CTFA (FP)
Loan Structuring, Documentation, Pricing and Problem Loans (w/ Textbook)	\$275	\$375	7.30	0.50	9.0 CLBB
Qualitative Analysis and Determining a Credit Risk Rating Suite	\$275	\$375	6	0.50	8.0 CLBB; 3.75 CERP
Relationship Sales for Small Business Clients Suite	\$135	\$180	0.25	0.00	0.5 CLBB, CFMP
Small Business Basics	\$55	\$75	0.20	0.00	N/A
Small Business Borrowing Suite	\$95	\$130	0.21	0.00	N/A
Small Business Operating and Life Cycle	\$55	\$75	0.25	0.00	N/A
Small Business Products Suite	\$95	\$130	0.20	0.00	0.5 CFMP
Treasury Management	\$55	\$75	0.15	0.00	N/A
Understanding Business Borrowers (w/ Textbook)	\$275	\$375	6.30	0.50	8.0 CLBB
THE COMMERCIAL REAL ESTATE LENDIN	G DECISION	PROCESS (RMA) (A	LL SERIES)		
Commercial Real Estate Lending Decision Process Full Curriculum	\$749	\$1,359	19	1	23.75 CLBB
Commercial Real Estate Lending Decision Process Core Curriculum	\$699	\$1,259	14	0.25	17.5 CLBB
Commercial Real Estate Lending Decision Process Underwriting Bundle	\$299	\$539	4.15	0.00	5.25 CLBB
Appraisals	\$199	\$349	2.30	0.00	3 CLBB
Construction Lending	\$249	\$449	3	0.00	3.75 CLBB
CRE Lending Overview	\$75	\$135	0.30	0.25	0.75 CLBB
Drivers of Performance	\$75	\$135	0.30	0.50	0.75 CLBB

				1			
Course Name	Member	Non-Member	Hrs.	Credit HRS	ICB		
Due Diligence and Documentation	\$125	\$225	1	0.00	1.25 CLBB		
Environmental Assessments	\$125	\$225	1	0.00	1.25 CLBB		
Homebuilder Lending	\$199	\$349	2	0.00	2.5 CLBB		
Underwriting- Example Calculations	\$125	\$225	1	0.00	1.25 CLBB		
Leases	\$125	\$225	1.15	0.00	1.5 CLBB		
Loan Structures	\$125	\$225	1	0.00	1.25 CLBB		
Risk Areas	\$199	\$349	2	0.00	2.5 CLBB		
		BUSINESS BANKIN	G & COMMERC	CIAL LENDING			
Underwriting- Basics	\$199	\$349	2	0.00	2.5 CLBB		
Underwriting- Different Types of	\$125	\$225	1.15	0.00	1.5 CLBB		
Commercial Properties							
THE LENDING DECISION PROCESS SERIE	S (RMA)			L			
RMA Lending Decision Process	\$720	\$1,440	35-50	2 - 3	49.75 CLBB		
Curriculum (ALL SERIES)	**	<b>4</b> 1, 1 1 5					
Series 1: Industry, Management, and	\$100	\$200	4	0.25	5.0 CLBB		
Economic Influences	*****	7=	-	5,25	5.0 5.2.2		
Series 2: Interpreting Quality of	\$100	\$200	5	0.50	6.0 CLBB		
Financial Reports and Accounts	7100	<b>7200</b>	,	0.50	0.0 0.00		
Series 3: Analyzing the Company's	\$200	\$400	12	0.50	14.50 CLBB		
Financial Performance and Financial	\$200	\$400	12	0.50	14.50 CLBB		
Condition Series 4: The Cash Cycle,	\$150	\$300	8	0.50	9.75 CLBB		
	\$150	<b>Ş300</b>	•	0.50	7./3 CLBB		
Seasonality, and Discovering Borrowing Causes and Repayment							
1							
Sources							
Series 5: Analyzing Cash Flow	\$150	\$300	6	0.50	7.25 CLBB		
Statements to Measure Long-Term							
Repayment Ability							
Series 6: Using Financial Projections	\$150	\$300	6	0.50	7.25 CLBB		
to Fine Tune the Credit Analysis							
THE LENDING DECISION PROCESS SERIE	S (RMA)						
RMA Lending Decision Process	\$720	\$1,440	35-50	2 - 3	49.75 CLBB		
Curriculum (ALL SERIES)							
Series 1: Industry, Management, and	\$100	\$200	4	0.25	5.0 CLBB		
Economic Influences							
Series 2: Interpreting Quality of	\$100	\$200	5	0.50	6.0 CLBB		
Financial Reports and Accounts							
Series 3: Analyzing the Company's	\$200	\$400	12	0.50	14.50 CLBB		
Financial Performance and Financial							
Condition							
Series 4: The Cash Cycle,	\$150	\$300	8	0.50	9.75 CLBB		
Seasonality, and Discovering							
Borrowing Causes and Repayment							
Sources							
Series 5: Analyzing Cash Flow	\$150	\$300	6	0.50	7.25 CLBB		
Statements to Measure Long-Term	\$15U	<b>3300</b>	0	0.50	7.23 CLBB		
Repayment Ability							
Series 6: Using Financial Projections	\$150	\$300	6	0.50	7.25 CLBB		
to Fine Tune the Credit Analysis	7130	<b>4000</b>	•	0.50	7.23 CLDD		
10 Tille Tolle lile Cleuii Allulysis		COMPLIANC	E O DICK MAN	CEMENT			
COMPLIANCE & RISK MANAGEMENT  COMPLIANCE OF COMPLIANCE PROFESSIONALS							
ONLINE TRAINING FOR COMPLIANCE P			_		7.05 00014 4.05 0500 0.00 0.450 1.55		
ABA Certificate in Deposit	\$995	\$1,295	12	0.50	7.25 CRCM, 4.25 CERP, 3.00 CAFP, 1.75		
Compliance					CSOP, 1.00 CERP		
ABA Certificate in Lending	\$1,095	\$2,595	8.25	1	10.75 CRCM, 8.75 CERP, 2.25 CAFP		
Compliance	\$1,075	Ψ <u>z</u> ,575	5.25	'	13.70 GROIN, 0.70 CERT, 2.20 CATT		

Course Name	Member	Non-Member	Hrs.	Credit HRS	ICB
ABA Certificate in BSA and AML	\$1,595	\$2,095	10	0.00	10.25 CAFP, 10.25 CRCM, 3.25 CFTA, 3.00
Compliance					CCTS, 2.25 CSOP, 1.00 CERP
ABA Certificate in Compliance	\$1,995	\$2,595	11.10	0.00	14.75 CRCM, 10.25 CERP, 3 CAFP,1.25 CCTS,
Essentials					1CFMP
ABA Certificate in Fraud Prevention	\$795	\$1,095	5.20	0.00	4.25 CAFP, 4.25 CERP, 1.50 CRCM
ABA Certificate in Mortgage Lending	\$1,995	\$2,595	13.45	0.00	17.5 CRCM, 8.75 CERP, 2.25 CAFP
Compliance					
Anatomy of a Regulation for	\$275	\$375	1.40	0.00	2.0 CRCM
Compliance Professionals					
Bank Bribery Act for Compliance	\$275	\$375	0.30	0.00	0.75 CRCM
Professionals					
Bank Protection Act for Compliance	\$275	\$375	1	0.00	0.75 CRCM
Professionals					
BSA/USA Patriot Act for Compliance	\$275	\$375	1	0.00	1.25 CRCM, CAFP
Professionals					
CAN-SPAM Act for Compliance	\$275	\$375	0.30	0.00	0.75 CFMP, CRCM
Professionals					
Community Reinvestment Act,	\$275	\$375	1.40	0.00	2.0 CRCM, CLBB
Community Bank (CRA) for	42.0	40.0			
Compliance Professionals					
Community Reinvestment Act, Large	\$275	\$375	1.40	0.00	2.0 CRCM, CLBB
Bank (CRA) for Compliance Professionals					
CRCM Exam Online Prep	\$895	\$1,045	N/A	N/A	N/A
Credit Card Regulations for	\$275	\$375	1.40	0.00	2.0 CRCM
Compliance Professionals	42.0	40.0			_10 0.10.11.
Digital Compliance for Compliance	\$275	\$375	0.40	0.00	1.0 CRCM
Professionals					
Electronic Funds Transfer Act for	\$275	\$375	1.10	0.00	1.5 CRCM, CFSSP, CAFP
Compliance Professionals					
Elements of a Compliance Program	\$275	\$375	1.40	0.00	2.0 CRCM
for Compliance Professionals					
Equal Credit Opportunity Act (ECOA)	\$275	\$375	2.30	0.20	3.0 CRCM
for Compliance Professionals					
Expedited Funds Availability (Reg	\$275	\$375	0.40	0.00	1.0 CRCM, CAFP
CC) for Compliance Professionals					
Fair Credit Reporting Act (FCRA) for	\$275	\$375	2.30	0.25	3.0 CRCM
Compliance Professionals					
Fair Debt Collection Practices Act for	N/A	N/A	N/A	N/A	N/A
Compliance Professionals (Coming					
Soon)	40	40			2.222
Fair Housing Act for Compliance	\$275	\$375	0.25	0.00	0.5 CRCM
Professionals	6075	6275	0.50	0.00	1 00 CEMP CROM CCOR
FDIC Coverage for Compliance Professionals	\$275	\$375	0.50	0.00	1.00 CFMP, CRCM, CSOP
Federal Benefit Payment	\$275	\$375	0.40	0.00	1.00 CRCM
Garnishment Rule FFIEC for	\$2/5	<b>33/3</b>	0.40	0.00	1.00 CRCIVI
Compliance Professionals					
Federal Flood Insurance Regulations	\$275	\$375	1	0.00	1.25 CERP, CRCM
for Compliance Professionals	"-	,	-		
Good Faith Estimate and HUD-1 for	\$95	\$130	0.20	0.00	0.5 CRCM
Compliance Professionals					
Home Mortgage Disclosure Act	\$275	\$375	2	0.25	2.5 CRCM
(HMDA) for Compliance					

Course Name	Member	Non-Member	Hrs.	Credit HRS	ICB
Homeowners Protection Act for	\$275	\$375	0.40	0.00	1.00 CRCM
Compliance Professionals					
Loans to Insiders (Reg O) for	\$275	\$375	2	0.00	1.25 CRCM, CLBB
Compliance Professionals	,	40.0	_		,
Military Lending Act for Compliance	\$275	\$375	0.35	0.00	0.75 CRCM
Professionals	\$275	<b>3373</b>	0.33	0.00	0.73 CKCM
	2075	6075	0.45	0.00	1.0.00011 0000 0070 07000 0450
Office of Foreign Assets Control	\$275	\$375	0.45	0.00	1.0 CRCM, CSOP, CCTS, CFSSP, CAFP
(OFAC) for Compliance					
Privacy/Information Sharing for	\$275	\$375	1.30	0.00	2.0 CRCM
Compliance Professionals					
Real Estate Settlement Procedures	\$275	\$375	2	0.25	2.5 CRCM
Act (RESPA) for Compliance					
Reg Z Ability to Repay (ATR) and	¢075	¢275	0.30	0.00	0.75 CDCM
Qualified Mortgage (QM) for	\$275	\$375	0.30	0.00	0.75 CRCM
Compliance Professionals					
Reg Z Closed-End Credit for	\$275	\$375	2.30	0.25	3.0 CRCM
Compliance Professionals	'	,			
Reg Z Open-End Credit for	\$275	\$375	1.40	0.00	2.0 CRCM
Compliance Professionals	72/3	<del>40</del> /3	1.40	0.00	2.0 CRCIM
Reserve Requirement for Depository					
Institutions Act (Reg D) for	\$275	\$375	0.20	0.00	0.5 CRCM, CSOP
Compliance Professionals					
Secure and Fair Enforcement for					
Mortgage Licensing Act (SAFE	\$275	\$375	0.40	0.00	1.00 CRCM
Act)/Reg G for Compliance					
Professionals					
Servicemembers Civil Relief Act	\$275	\$375	1.40	0.00	2.0 CRCM
(SCRA) for Compliance Professionals					
Title III of the Americans with	N/A	N/A	N/A	N/A	N/A
Disabilities Act for Compliance	N/A	N/A	N/A	N/A	N/A
Professional					
Truth-in-Savings Act (Reg DD) for	\$275	\$375	1	0.00	1.25 CRCM
Compliance Professionals					
Unfair, Deceptive, or Abusive Acts or	\$275	\$375	1.40	0.00	2.25 CRCM
Practices (UDAAP) for Compliance					
Professionals					
RISK MANAGEMENT	l			1	
ABA Certificate in BSA and AML	\$1,595	\$2,095	10	0.50	10.25 CAFP, 10.25 CRCM, 3.25 CFTA, 3.00
Compliance	.,.,.,	+=/			CCTS, 2.25 CSOP, 1.00 CERP
ABA Certificate in Fraud Prevention	\$795	\$1,095	5.30	0.50	4.25 CAFP, 4.25 CERP, 1.50 CRCM
ABA Certificate in Financial and	\$1,295	\$1,795	5.15	0.50	7.0 CERP
Credit Risk Management	61 505	60.005	10	0.50	0.25 CAED: 12.75 CEDD: 11.5 CDCM: 0.75
ABA Certificate in Operational Risk	\$1,595	\$2,095	10	0.50	9.25 CAFP; 12.75 CERP; 11.5 CRCM; 9.75
Management					CSOP
CAFP Exam Online Prep	\$895	\$1,045	NA	0.00	NA
CERP Exam Online Prep	\$895	\$1,045	NA	0.00	NA
Credit Risk Management:	\$275	\$375	0.45	0.00	1.0 CERP
Commercial and Agricultural	72,3	40/3	0.40	0.00	1.0 CERI
Lending					
Credit Risk Management: Managing,	\$275	\$375	0.40	0.00	1.0 CERP
Monitoring, and Measuring					
Credit Risk Management: Other	\$275	\$375	0.45	0.00	1.0 CERP
Sources of Credit Risk	, J_, J	45,5	0.40	0.00	JEM
Credit Risk Management: Retail	\$275	\$375	0.40	0.00	1.0 CERP
Lending	32/5	<b>33/5</b>	0.40	0.00	I.U CERP
Lending	<u> </u>			1	

Course Name	Member	Non-Member	Hrs.	Credit HRS	ICB
Cyber-security Management	\$275	\$375	1	0.00	1.25 CAFP, CFSSP, CRCM, CSOP
Elements of an Operational Risk	\$275	\$375	1	0.00	1.0 CAFP; 1.0 CRCM; 1.0 CSOP
Management Program		,			, , , , , , , , , , , , , , , , , , , ,
Financial Risk Management: Interest	\$275	\$375	0.50	0.00	1.0 CERP
Rate Risk					
Financial Risk Management:	\$275	\$375	0.45	0.00	1.0 CERP
Liquidity Risk	,	,			
Fraud and Criminal Threats	\$275	\$375	1	0.00	1.00 CAFP,1.0 CFSSP, 1.0 CRCM
Incident Management and	\$275	\$375	1	0.00	1.25 CFSSP, 1.25 CSOP
Resilience	,	,			, , , , , , , , , , , , , , , , , , , ,
Introduction to Credit Risk	\$275	\$375	0.45	0.00	1.0 CERP
Operational Risk Model	\$275	\$375	1	0.00	1.5 CAFP; 1.5 CRCM; 1.5 CSOP
Management					
Oversight and Management of	\$275	\$375	1	0.00	1.25 CAFP,1.25 CRCM, 1.25 CSOP
Operational Risk					
Payments and Settlements	\$275	\$375	1	0.00	1.0 CAFP, 1.0 CRCM, 1.0 CSOP, 1.0 CFSSP
Physical Security	\$275	\$375	1	0.00	1.0 CRCM,1.0 CFSSP
Regulatory Exam Management	\$275	\$375	1	0.00	1.0 CAFP,1.0 CRCM
Risk and Control Self-Assessment	\$275	\$375	1	0.00	1.25 CRCM,1.25 CSOP
(RCSA)					
Vendor Risk Management	\$275	\$375	1	0.00	1.25 CAFP, CRCM, CSOP
RISK MANAGEMENT FRAMEWORKS					
ABA Certificate in Risk Management	\$1,395	\$1,895	8.00	0.50	9.75 CERP, 4.50 CRCM
Frameworks					
Board and Senior Management	\$275	\$375	0.40	0.00	1.0 CERP
Oversight					
Enterprise Risk Management	\$275	\$375	0.75	0.00	1.5 CERP
Reporting					
Introduction to Enterprise Risk	\$275	\$375	0.45	0.00	1.0 CERP
Management	42.0	45.5	0.10		
Risk Identification	\$275	\$375	0.40	0.00	1.0 CERP
Risk Management Control	\$275	\$375	0.40	0.00	1.0 CERP
Framework	42.0	40.0	0.40	0.00	1.0 SEM
Risk Measurement and Evaluation	\$275	\$375	0.50	0.00	1.0 CERP
Risk Mitigation	\$275	\$375	0.40	0.00	1.0 CERP
Risk Monitoring	\$275	\$375	1.00	0.00	1.25 CERP
Risk Policies, Procedures, and Limits	\$275	\$375	0.40	0.00	1.0 CERP
FRONTLINE COMPLIANCE TRAINING					<u> </u>
Bank Director Series	\$895	\$1,195	1.45	0.00	N/A
Beyond the Welcome: New Director	N/A	\$75	0.09	0.00	N/A
Onboarding		•••			,
Board Oversight: Bank Governance	N/A	\$75	0.04	0.00	N/A
Structure					,
Board Oversight: BSA/AML/OFAC	N/A	\$75	0.04	0.00	N/A
Board Oversight: Compliance	N/A	\$75	0.05	0.00	N/A
Management	N/A	\$/5	0.05	0.00	N/A
Board Oversight: Compliance	NI /A	675	0.04	0.00	NI/A
Control Activities	N/A	\$75	0.04	0.00	N/A
	N1 / A	67-	0.00	0.00	N/2
Board Oversight: Credible Challenge	N/A	\$75	0.04	0.00	N/A
Board Oversight: Effective	N/A	\$75	0.05	0.00	N/A
Compliance Management System		'			·
(CMS)		1			
Board Oversight: Fair Lending	N/A	\$75	0.05	0.00	N/A
Board Oversight: Fostering	N/A	\$75	0.03	0.00	N/A
Innovation	<u> </u>				

Course Name	Member	Non-Member	Hrs.	Credit HRS	ICB
Board Oversight: Insiders and	N/A	\$75	0.07	0.00	N/A
Regulation O					
Board Oversight: Managing	N/A	\$75	0.04	0.00	N/A
Reputation Risk					
Board Oversight: Preparing for the	N/A	\$75	0.04	0.00	N/A
Compliance Exam					
Board Oversight: Post Compliance	N/A	\$75	0.05	0.00	N/A
Exam Activities					
Digital Trends: Cybersecurity	N/A	\$75	0.04	0.00	N/A
Digital Trends: Blockchain	N/A	\$75	0.05	0.00	N/A
Digital Trends: Payments	N/A	\$75	0.05	0.00	N/A
Diversifying the Board: Strategies ad	N/A	\$75	0.11	0.00	N/A
Best Practices					
Encouraging Women to Accept the	N/A	\$75	0.11	0.00	N/A
Ask		4			
What Do Bank Boards Do?	N/A	\$75	0.07	0.00	N/A
Active Aggressor for Employees	\$55 \$05	\$75 \$130	0.35	0.00	0.75 CFSSP
Active Aggressor for Managers  ADA Accessibility	\$95 \$55	\$130 \$75	0.40	0.00	1 CFSSP 1.0 CRCM
ADA Accessibility  ADA Interacting with People Who	+	· ·			1.0 CRCM
Have Disabilities	\$55	\$75	0.30	0.00	I CKCM
ADA Overview and Employment	\$95	\$130	0.45	0.00	1.0 CRCM
Advertising: CAN-SPAM Act	\$55	\$75	0.30	0.00	0.75 CRCM, CFMP
Advertising: Overview for Marketers	\$95	\$130	0.40	0.00	1 CFMP
Appraisals: FIRREA and Interagency	\$95	\$130	0.50	0.00	1.0 CLBB, CRCM
Appraisals: Reg Z Requirements	\$55	\$75	0.25	0.00	0.5 CLBB, CRCM
Bank Bribery Act	\$55	\$75	0.20	0.00	0.5 CFSSP
Bank On: Opening the Door to	\$55	\$75	0.30	0.00	0.75 CFMP
Bank Protection Act	\$35	\$55	0.15	0.00	N/A
Banking Law and Referrals	\$95	\$130	0.40	0.00	1.0 CCTS, CRCM, CRSP, CSOP, CTFA(FID)
Best Practices for Managing Remote Employees	\$35	\$55	0.15	0.00	N/A
BSA/AML: Beneficial Ownership and	\$55	\$75	0.30	0.00	0.75 CAFP, CRCM
Customer Due Diligence		4			
BSA/AML: CIP Advanced	\$55	\$75	0.30	0.00	0.75 CCTS, CFSSP, CLBB, CRCM, CSOP,
BSA/AML: CIP Basics BSA/AML: Communicating with	\$55	\$75	0.40	0.00	0.75 CFSSP, CRCM, CAFP 0.5 CFSSP, CRCM, CAFP
Customers about CTRs	\$55	\$75	0.20	0.00	0.5 Crssr, CRCM, CAFF
BSA/AML: Completing the CTR	\$95	\$130	0.45	0.00	1.0.CESSD. CDCAA. CAED
BSA/AML: Exempting the CTR  BSA/AML: Exempting Customers	\$55	\$130 \$75	0.45 0.25	0.00	1.0 CFSSP, CRCM, CAFP 0.5 CCTS CFSSP, CLBB, CRCM, CSOP,
from CTR Reporting	<b>355</b>	Ş/3	0.25	0.00	CFTA(FID),
BSA/AML: Fundamentals	\$55	\$75	0.30	0.00	0.75 CAFP, CCTS, CRCM, CSOP, CTFA
BSA/AML: Recordkeeping – Wires,	\$55	\$75	0.20	0.00	0.5 CCTS, CFSSP, CLBB, CRCM, CSOP, CFTA(FID)
Money Order, and other Challenges			*		, , , , , , , , , , , , , , , , , , , ,
BSA/AML: Reporting	\$55	\$75	0.20	0.00	0.5 CCTS, CFSSP, CLBB, CRCM, CSOP, CFTA(FID),
BSA/AML: Risk Assessment and	\$55	\$75	0.15	0.00	0.25 CCTS, CFSSP, CLBB, CRCM, CSOP,
Customer Due Diligence	,				CFTA(FID),
BSA/AML: SAR Filing	\$95	\$130	0.40	0.00	1.0 CCTS, CFSSP,CLBB,CRCM,CSOP,CFTA(FID),
BSA/AML: USA PATRIOT ACT	\$55	\$75	0.20	0.00	0.5 CCTS,CFSSP,CLBB,CRCM,CSOP,CFTA(FID),
Community Reinvestment Act	\$55	\$75	0.30	0.00	0.5 CLBB
Conscious Bias	\$55	\$75	0.30	0.00	N/A
Culturally Respectful Customer Service	\$95	\$130	0.55	0.00	N/A
Cybersecurity Fundamentals	\$55	\$75	0.30	0.00	0.75 CFSSP, CRCM, CSOP
E-Sign Compliance	\$55	\$75	0.35	0.00	0.75 CRCM

Course Name	Member	Non-Member	Hrs.	Credit HRS	ICB
Elder Financial Exploitation	\$55	\$75	0.25	0.00	0.5 CRCM, CTFA (FP)
ECOA and Regulation B: Overview	\$55	\$75	0.35	0.00	0.75 CLBB, CRCM
Extending Credit to Bank Insiders (Reg O)	\$35	\$55	0.15	0.00	0.5 CLBB, CRCM
	655	675	0.00	0.00	0.5.0004
FCRA: Adverse Action	\$55	\$75	0.20	0.00	0.5 CRCM
FCRA: Affiliate/Third Party	\$35	\$55	0.15	0.00	0.5 CRCM
FCRA: Duties of Furnishers	\$35	\$55	0.15	0.00	0.5 CRCM
FCRA: Introduction and Overview	\$35	\$55	0.15	0.00	0.5 CRCM
FCRA: Medical Information Sharing	\$35	\$55	0.15	0.00	N/A
FCRA: Notice to Consumers (Risk- Based Pricing)	\$55	\$75	0.20	0.00	0.5 CRCM
FCRA: Permissible Purpose	\$55	\$75	0.20	0.00	0.5 CRCM
FCRA: Prescreened Offers of Credit	\$35	\$55	0.15	0.00	0.5 CRCM
FCRA: Use of Consumer Reports in Employment	\$35	\$55	0.15	0.00	N/A
Fair Housing Act	\$55	\$75	0.25	0.00	N/A
Fair Lending Act	\$95	\$130	1.10	0.00	1.5 CLBB
Fair Lending for Marketers	\$35	\$55	0.15	0.00	0.25 CFMP
FDIC Insurance Coverage	\$95	\$130	0.50	0.00	1.0 CRCM, CSOP
FDIC for Marketers	\$35	\$55	0.15	0.00	0.25 CFMP
Flood Disaster Protection Act	\$35	\$55	0.25	0.00	0.5 CLBB
Fraud Recognition and Prevention	\$95	\$130	0.50	0.00	1.0 CRCM, CAFP, CFSSP
Good Faith Estimate and HUD-1	\$55	\$75	0.15	0.00	0.25 CRCM
Home Mortgage Disclosure Act	\$55	\$75	0.30	0.00	1.0 CRCM
(HDMA) Overview	co.c	£120	0.20	0.00	0.75 00014 05140
Homeowners Protection Act	\$95	\$130	0.30	0.00	0.75 CRCM, CFMP
Human Trafficking and Human Smuggling	\$95	\$130	1.00	0.00	1.25 CAFP, CRDM
Identity Theft Red Flags and Information Security	95	130	0.45	0.00	1.0 CCTS, CRCM, CSOP, CAFP
Leveraging the Benefits of a Diverse Workforce	\$95	\$130	0.55	0.00	N/A
Military Lending Act	\$95	\$130	0.40	0.00	1.0 CRCM
Mortgage Servicing: ARM Notices	\$55	\$75	0.30	0.00	0.75 CRCM
Mortgage Servicing: Early	\$55	\$75	0.30	0.00	0.75 CRCM
Mortgage Servicing: Error Resolution	\$95	\$130	0.40	0.00	1 CRCM
Mortgage Servicing: Escrow Accounts	\$95	\$130	0.40	0.00	1 CRCM
Mortgage Servicing: Force-Placed Insurance	\$95	\$130	0.40	0.00	1 CRCM
Mortgage Servicing: Loan Origination and Servicing Transfers	\$95	\$130	0.45	0.00	1 CRCM
Mortgage Servicing: Loss Mitigation	\$95	\$130	0.45	0.00	1 CRCM
Mortgage Servicing: Overview	\$95	\$130	0.45	0.00	1 CRCM
Mortgage Servicing: Payment	\$95	\$130	0.40	0.00	1 CRCM
Mortgage Servicing: Successors in Interest	\$95	\$130	0.45	0.00	1 CRCM
Office of Foreign Assets Control (OFAC)	\$55	\$75	0.20	0.00	0.5 CCTS, CFSSP, CLBB, CRCM, CSOP, CAFP
FCRA: Use of Consumer Reports in Employment	\$35	\$55	0.15	0.00	N/A
Privacy: GLBA Rule (Reg P)	\$55	\$75	0.25	0.00	N/A
Privacy: GLBA Safeguards Rule	\$55 \$55	\$75	0.10	0.00	N/A
Privacy: Overview of Laws	\$55 \$55	\$75	0.10	0.00	N/A
invacy. Overview of Laws	755	7/3	J.2J	0.00	I N/A

Course Name	Member	Non-Member	Hrs.	Credit HRS	ICB
Real Estate Settlement Procedures	\$95	\$130	1	0.00	1.05.0004
Act (RESPA)					1.25 CRCM
Recognizing and Preventing UDAAP	\$95	\$130	1	0.00	1.25 CRCM, CSOP
Reg B: Appraisals and Other	\$55	\$75	0.20	0.00	0.50 CLBB, CRCM
Valuations					0.30 CLDD, CROM
Reg B: Creditors' Requests for	\$35	\$55	0.15	0.00	0.50 CLBB, CRCM
Information					·
Reg B: Evaluating Applications	\$55	\$75	0.20	0.00	0.50 CLBB, CRCM
Reg B: Notifications	\$35	\$55	0.15	0.00	0.50 CLBB, CRCM
Reg CC Check 21	\$35	\$55	0.15	0.00	0.50 CRCM
Reg CC: Disclosures and	\$35	\$55	0.7	0.00	0.25 CAFP, CFSSP, CRCM
Notifications		<b>.</b>			, ,
Reg CC: Exceptions to Funds	\$35	\$55	0.5	0.00	0.10 CAFP, CFSSP, CRCM
Availability Schedules					, ,
Reg CC: Funds Availability	\$35	\$55	0.7	0.00	0.25 CAFP, CFSSP, CRCM
Schedules					
Reg CC Indorsements	\$55	\$75	0.20	0.00	0.50 CRCM
Reg CC Subpart C	\$95	\$130	0.40	0.00	1.0 CAFP, CFSSP, CRCM
Reg DD Disclosures and Payment of	\$55	\$75	0.21	0.00	0.50 CRCM
Interest	_				
Reg DD for Marketers	\$55	\$75	0.25	0.00	0.5 CFMP
Reg DD Overdraft Rules	\$55	\$75	0.25	0.00	0.75 CRCM
Reg E Consumer Liability	\$55	\$75	0.25	0.00	0.5 CFSSP, CRCM, CAFP
Reg E Consumer Remittances	\$95	\$130	1.10	0.00	1.50 CRCM
Reg E Disclosure Requirements	\$55	\$75	0.20	0.00	0.5 CFSSP, CRCM, CAFP
Reg E Error Resolution Requirements	\$55	\$75	0.25	0.00	0.5 CFSSP, CRCM, CAFP
Reg E Gift Cards	\$55	\$75	0.20	0.00	0.5 CFSSP, CRCM
Reg E Overdrafts	\$55	\$75	0.25	0.00	0.5 CFSSP, CRCM
Reg E Overview	\$55	\$75	0.35	0.00	0.75 CFSSP, CRCM, CAFP
Reg E Payroll Cards	\$35	\$55 \$55	0.15	0.00	0.25 CFSSP, CRCM
Reg E Preauthorized Transfers	\$35		0.15	0.00	0.25 CFSSP, CRCM
Reg E Prepaid Accounts Reg F: Fair Debt Collections	\$95 \$95	\$130 \$130	0.40 1.00	0.00	1 CFSSP, CRCM 1.25 CRCM
Reg W: Affiliate Transactions	\$35	\$55	0.15	0.00	0.5 CRCM
Reg Z Adjustable-Rate Mortgages	\$55	\$75	0.15	0.00	0.5 CRCM
Reg Z Advertising	\$95	\$130	0.45	0.00	0.5 CFMP, CRCM
Reg Z Advertising Reg Z Advertising for Marketers	\$95	\$130	0.45	0.00	0.5 CRCM, CFMP
Reg Z Credit Cards	\$55	\$75	0.35	0.00	0.75 CLBB, CRCM
Reg Z HELOCs (Open-End Credit)	\$55	\$75	0.35	0.00	0.75 CLBB, CRCM
Reg Z HOEPA and Higher-Priced	\$95	\$130	0.50	0.00	C.75 CLDD, CROM
Mortgage Loans	<b>373</b>	\$130	0.50	0.00	1.0 CLBB, CRCM
	655	675	0.20	0.00	
Reg Z Installment and Home Equity Loans (Closed-End Credit)	\$55	\$75	0.30	0.00	0.75 CLBB, CRCM
	Ĉ.F.F	¢75	0.00	0.00	
Reg Z Mortgages (Closed-End Credit)	\$55	\$75	0.20	0.00	0.5 CLBB, CRCM
	¢.r.r	675	0.00	0.00	
Reg Z Non-Home Secured (Open-	\$55	\$75	0.20	0.00	0.5 CLBB, CRCM
End Credit)	00-	6166	0	0.00	· 
Reg Z Overview	\$95	\$130	0.50	0.00	1.0 CLBB, CRCM
Reg Z Private Education Loans	\$55	\$75 675	0.20	0.00	0.5 CLBB, CRCM
Reg Z Reverse Mortgages	\$55	\$75	0.25	0.00	0.5 CLBB, CRCM
Reg Z Right of Rescission	\$55	\$75	0.35	0.00	0.75 CLBB, CRCM
Reserve Requirements for Depository	\$55	\$75	0.40	0.00	N/A
Institutions (Reg D)	*				
Right to Financial Privacy Act (RFPA)	\$55	\$75	0.30	0.00	0.75 CLBB, CRCM, CSOP, CTFA
Robbery and Bank Security	\$95	\$130	0.45	0.00	N/A

Course Name	Member	Non-Member	Hrs.	Credit HRS	ICB
Servicemember Civil Relief Act	\$95	\$130	0.50	0.00	1.0 CRCM
Sexual and Workplace Harassment	\$95	\$130	0.40	0.00	N/A
Sexual and Workplace Harassment	\$95	\$130	1	0.00	N/A
Social Media: Managing the Risks	\$95	\$130	0.45	0.00	1.0 CFMP, CRCM
Social Media for Marketers	\$55	\$75	0.25	0.00	0.5 CFMP
Telephone Consumer Protection Act (TCPA)	\$95	\$130	0.40	0.00	1.0 CRCM
The S.A.F.E. Act – Secure and Fair	\$95	\$130	0.30	0.00	0.75 CRCM
Enforcement for Mortgage Licensing					
Act					
TILA-RESPA Integrated Disclosures	\$55	\$75	0.30	0.00	0.75 CRCM
UDAPP for Marketers	\$95	\$130	0.45	0.00	1.00 CFMP
Unlawful Internet Gambling	\$55	\$75	0.20	0.00	0.5 CRCM, CFSSP
ABA Certificate in Bank Financial Management	N/A	N/A	NA	0.00	72 CERP; 1CAFP, CCTS, CFMP, CFSSP, CISP, CLBB, CRCM, CRSP, CSOP
Ethical Issues for Bankers	\$55	\$75	0.25	0.00	1 CAFP, CCTS, CFMP, CISP, CLBB, CRCM, CRSP,
Leveraging the Benefits of a Diverse Workforce	\$95	\$130	0.55	0.00	N/A
	coor	61.175	N1 / A	0.00	
ABA Wharton Competitive and Corporate Strategy Curriculum	\$925	\$1,175	N/A	0.00	N/A
ABA-Wharton Emerging Leaders – Strategy (Certificate Curriculum)	\$1,695	\$2,195	N/A	0.00	14.50 CERP
ABA-Wharton Emerging Leaders – Engaging and Motivating Talent (Certificate Curriculum)	\$1,695	\$2,195	N/A	0.00	N/A
ABA-Wharton Emerging Leaders – Advanced Leadership (Certificate Curriculum)	\$695	\$925	N/A	0.00	N/A
ABA Wharton Leadership in the 21st Century Curriculum	\$925	\$1,175	N/A	0.00	N/A
ABA Wharton Managing and Motivating Talent Curriculum	\$925	\$1,175	N/A	0.00	N/A
ABA Wharton Managing the Value of Customer Relationships Curriculum	\$925	\$1,175	N/A	0.00	N/A
Emerging Leaders: Developing a Personal Value Proposition	\$135	\$185	0.15	0.00	0.50 CTFA
		EXEC	UTIVE EDUCATION	ON	
Emerging Leaders: Emotional Intelligence	\$135	\$185	0.15	0.00	0.50 CTFA
Emerging Leaders: Mastering the Art of Inquiry	\$135	\$185	0.25	0.00	0.50 CTFA
	I	MOR	TGAGE LENDIN	G	
ABA Residential Mortgage Lender Certificate	\$775	\$985	22	1	1.5 CAFP, CRCM, 1.25 CFMP, CSOP; 1.0 CCTS, CISP, CRSP, 8.25 CTFA
Effective Referrals Suite	\$55	\$75	0.15	0.00	0.5 CLBB
Ethical Issues for Bankers	\$55	\$75	0.25	0.00	1.0 CAFP, CCTS, CFMP, CFSSP, CISP, CLBB, CRCM, CRSP, CSOP, CTFA
Handling Mortgage Inquiries and Making Referrals	\$95	\$130	1.40	0.25	2.0 CRCM
Mortgage Customer Counseling and Prequalification	\$95	\$130	2.30	0.25	N/A
Personal Tax Return Analysis	\$95	\$130	6	0.50	7.25 CLBB, CTFA (FP)
RESIDENTIAL LENDING COURSES (ALL REC	GS)				• •
Appraisal Procedures	\$105	\$143	1	0.00	N/A
Basics of Mortgage Processing	\$105	\$143	0.45	0.00	N/A

Determining Your Role In Froud   \$105   \$143   0.30   0.00   N/A	Course Name	Member	Non-Member	Hrs.	Credit HRS	ICB
Discovering PIAA Programs   5105   5143   1   0.00   N.A	_	\$105	\$143	0.30	0.00	N/A
Essentinis of Mortgrage Lendring   5105   5143   1.30   0.00   N/A		¢10E	\$1.42	1	0.00	, N/A
Explaining Loan Modifications   \$105   \$143   1   0.00   N/A	,	· ·	·			·
Millgarting Potential Froud in Your Cignolization   S105   S143   D.30   D.00   N/A			·			·
Segretar   Segretar	· · ·					N/A
Preparing the Closing Disclosure   \$105   \$143   1   0.00   N/A	Organization		Ş140	0.30	0.00	N/A
Preparing the Loon Estimate   \$105   \$143   1   0.00   N/A	RESIDENTIAL LENDING COURSES (ALL REC				ı	
Processing Income and Assets   \$105   \$143   1   0.00   N/A			· ·			
Reviewing the Uniform Residential Approach (Reviewing the Uniform Residential Approach (Report		· ·	·	="		·
Reviewing the Uniform Residential Approisal Report   S195   S143   1   0.00   N/A			·			·
Payment Systems Training Suite   \$295   \$395   \$1.20   \$0.00   \$1.0 CFP; 1.0 CFMP; 1.0 CRCM			·			N/A
Payment Systems Training Suite   \$295   \$395   \$1.20   0.00   2.0 CAPP; 1.0 CFMP; 1.0 CRCM	_	\$105	\$143	1	0.00	N/A
Payment Systems Training Suite   \$295   \$395   \$1.20   \$0.00   \$2.0 CAFP; 1.0 CEMP; 1.0 CEMP	Арргаізаі кероп		D.4.\	/AAFNIT 0.V.0TFAA		
Payment Systems Emerging Products   \$195   \$225   \$0.40   \$0.00   1 CAFP; CFMP	Daymont Systems Training Suits	\$205				2.0 CAED: 1.0 CEMP: 1.0 CBCM
Payment Systems Trends			·			
Name	,		·			· ·
Marketing in a Digital World: Digital   \$299   \$399   \$3.30   \$0.00   \$4.5 CFMP	r dymem systems nends	<b>V170</b>	·			I CAIT, CROM
Marketing in a Digital World: Digital Campaigns   S399   S399   S399   S399   S390	DIGITAL MARKETING (MINDSET DIGITAL)		KEIAIE DAN	KINO AND MA	KKEIIIVO	
Find your Audience	Marketing in a Digital World: Digital	ı	\$399	3.30	0.00	4.5 CFMP
Find your Audience	Build Your Campaian	\$129	\$179	0.45	0.00	1.0 CFMP
Search Engine Optimization   \$129   \$179   1   0.00   1.25 CFMP			·		0.00	
Seneral Banking				1	0.00	
Certificate   S695   S995   13   1.00   1.5 CAFP, CRSNP, CIBB, CRSP, CTFA		<u> </u>	· · ·		1	
ABA Bank Teller Certificate   \$695   \$995   13   1.00   1.5 CAFP, CFSSP, CRCM, CLBB; 1.25 CFMP, ABA Branch Manager Certificate   \$1.295   \$1.595   14   2.00   1.75 CFMP; 1.5 CAFP, CRCM; 1.25 CSOP; 1.0		\$495	\$695	6.30	0.50	1 1 1
ABA Branch Manager Certificate   \$1.295   \$1.595   14   2.00   1.75 CFMP; 1.5 CAFP, CRCM; 1.25 CSOP; 1.0	ABA Bank Teller Certificate	\$695	\$995	13	1.00	
Management   CLBB, CRCM, CRSP, CSOP		\$1,295	\$1,595	14	2.00	1.75 CFMP; 1.5 CAFP, CRCM; 1.25 CSOP; 1.0
ABA Customer Service   S795   S995   10.30   1.50   1.5 CAFP, CRCM, 1.25 CFMP, CSOP; 1 CCTS, Curriculum   CISP, CRSP, CTFA   CISP, CRSP, CTGM, CSOP   CISP, CISP, CRSP, CRCM, CSOP   CISP, CRSP, CRCM, CSOP   CISP, CRSP, CRCM, CSOP   CISP, CRSP, CRCM, CISP, CIS		N/A	N/A	N/A	0.00	
ABA Customer Service   Representative Certificate   S795   S995   10.30   1.00   1.5 CAFP, CRCM, 1.25 CFMP, CSOP; 1 CCTS, CISP, CRSP, CIFA		Pricing				
Curriculum	ABA Customer Service	\$795	\$995	10.30	1.00	1.5 CAED CDCM 1.25 CEMP CSOD, 1.CCTS
ABA Digital Banker Certificate         \$495         \$595         3         0.00         2.75 CFMP, 2.0 CAFP, 1.75 CRCM, 0.75 CSOP           ABA Foundational Certificate in Bank Marketing         N/A         N/A         17.00         2.00         49.00 CFMP, 1.25 CRCM, CSOP           ABA Personal Banker Certificate         \$795         \$995         13.50         1.00         1.5 CAFP, CRCM, 1.25 CFMP, CSOP; 1 CCTS, CISP,           ABA Universal Banker Certificate         \$795         \$995         9.30         0.50         1.5 CAFP, CRCM, 1.25 CFMP, CSOP; 1 CCTS, CISP,           Bank Marketing: Building Basics Suite         \$595         \$795         2         0.00         N/A           Bank Marketing: Building Customer Relationships         \$55         \$75         0.12         0.00         N/A           Bank Sales and Service: Expanding Customer Relationships         \$55         \$75         0.10         0.00         N/A           Banks as a Business         \$55         \$75         0.10         0.00         N/A           Banks and the Deposit Function         \$55         \$75         0.10         0.00         N/A           Banks and Personal Wealth Management         \$55         \$75         0.10         0.00         N/A           Business and International Banking Services         \$75 <td>· ·</td> <td></td> <td></td> <td></td> <td></td> <td></td>	· ·					
ABA Foundational Certificate in Bank Marketing         N/A         17.00         2.00         49.00 CFMP, 1.25 CRCM, CSOP           ABA Personal Banker Certificate         \$795         \$995         13.50         1.00         1.5 CAFP, CRCM, 1.25 CFMP, CSOP; 1 CCTS, CISP,           ABA Universal Banker Certificate         \$795         \$995         9.30         0.50         1.5 CAFP, CRCM, 1.25 CFMP, CSOP; 1 CCTS, CISP,           Banking Basics Suite         \$595         \$795         2         0.00         N/A           Bank Marketing: Building Customer Relationships         \$55         \$75         0.12         0.00         N/A           Bank Payment System and Technology         \$55         \$75         0.10         0.00         N/A           Bank Sales and Service: Expanding Customer Relationships         \$55         \$75         0.12         0.00         N/A           Banks as a Business         \$55         \$75         0.12         0.00         N/A           Banks and the Deposit Function         \$55         \$75         0.10         0.00         N/A           Banks and Personal Wealth         \$55         \$75         0.10         0.00         N/A           Business and International Banking Services         \$55         \$75         0.12         0.00         N/		\$495	\$595	3	0.00	
Marketing         49.00 CFMP, 1.25 CRCM, CSOP           ABA Personal Banker Certificate         \$795         \$995         13.50         1.00         1.5 CAFP, CRCM, 1.25 CFMP, CSOP; 1 CCTS, CISP,           ABA Universal Banker Certificate         \$795         \$995         9.30         0.50         1.5 CAFP, CRCM, 1.25 CFMP, CSOP; 1 CCTS, CISP,           Banking Basics Suite         \$595         \$775         2         0.00         N/A           Bank Marketing: Building Customer Relationships         \$55         \$75         0.12         0.00         N/A           Bank Sales and Service: Expanding Customer Relationships         \$55         \$75         0.12         0.00         N/A           Banks as a Business         \$55         \$75         0.10         0.00         N/A           Banks and the Deposit Function         \$55         \$75         0.10         0.00         N/A           Banks and Personal Wealth         \$55         \$75         0.10         0.00         N/A           Business and International Banking Services         \$55         \$75         0.10         0.00         N/A		-				
ABA Universal Banker Certificate         \$795         \$995         9.30         0.50         1.5 CAFP, CRCM, 1.25 CFMP, CSOP; 1 CCTS, CISP,           Banking Basics Suite         \$595         \$775         2         0.00         N/A           Bank Marketing: Building Customer Relationships         \$55         \$75         0.12         0.00         N/A           Bank Payment System and Technology         \$55         \$75         0.10         0.00         N/A           Bank Sales and Service: Expanding Customer Relationships         \$55         \$75         0.12         0.00         N/A           Banks as a Business         \$55         \$75         0.10         0.00         N/A           Banks and the Deposit Function         \$55         \$75         0.10         0.00         N/A           Banks and Personal Wealth Management         \$55         \$75         0.10         0.00         N/A           Business and International Banking Services         \$55         \$75         0.12         0.00         N/A	Marketing	-	-			49.00 CFMP, 1.25 CRCM, CSOP
Banking Basics Suite         \$595         \$795         2         0.00         N/A           Bank Marketing: Building Customer Relationships         \$55         \$75         0.12         0.00         N/A           Bank Payment System and Technology         \$55         \$75         0.10         0.00         N/A           Bank Sales and Service: Expanding Customer Relationships         \$55         \$75         0.12         0.00         N/A           Banks as a Business         \$55         \$75         0.10         0.00         N/A           Banks and the Deposit Function         \$55         \$75         0.10         0.00         N/A           Banks and the Economy         \$55         \$75         0.10         0.00         N/A           Banks and Personal Wealth Management         \$55         \$75         0.10         0.00         N/A           Business and International Banking Services         \$55         \$75         0.12         0.00         N/A	ABA Personal Banker Certificate	\$795	\$995	13.50	1.00	1.5 CAFP, CRCM, 1.25 CFMP, CSOP; 1 CCTS, CISP,
Bank Marketing: Building Customer Relationships         \$55         \$75         0.12         0.00         N/A           Bank Payment System and Technology         \$55         \$75         0.10         0.00         N/A           Bank Sales and Service: Expanding Customer Relationships         \$55         \$75         0.12         0.00         N/A           Banks as a Business         \$55         \$75         0.10         0.00         N/A           Banks and the Deposit Function         \$55         \$75         0.10         0.00         N/A           Banks and the Economy         \$55         \$75         0.10         0.00         N/A           Banks and Personal Wealth Management         \$55         \$75         0.10         0.00         N/A           Business and International Banking Services         \$55         \$75         0.12         0.00         N/A	ABA Universal Banker Certificate	\$795	\$995	9.30	0.50	1.5 CAFP, CRCM, 1.25 CFMP, CSOP; 1 CCTS, CISP,
Relationships         S55         \$75         0.10         0.00         N/A           Bank Payment System and Technology         \$55         \$75         0.10         0.00         N/A           Bank Sales and Service: Expanding Customer Relationships         \$55         \$75         0.12         0.00         N/A           Banks as a Business         \$55         \$75         0.10         0.00         N/A           Banks and the Deposit Function         \$55         \$75         0.10         0.00         N/A           Banks and the Economy         \$55         \$75         0.10         0.00         N/A           Banks and Personal Wealth Management         \$55         \$75         0.10         0.00         N/A           Business and International Banking Services         \$55         \$75         0.12         0.00         N/A	Banking Basics Suite		\$795	2	0.00	-
Bank Payment System and Technology         \$55         \$75         0.10         0.00         N/A           Bank Sales and Service: Expanding Customer Relationships         \$55         \$75         0.12         0.00         N/A           Banks as a Business         \$55         \$75         0.10         0.00         N/A           Banks and the Deposit Function         \$55         \$75         0.10         0.00         N/A           Banks and the Economy         \$55         \$75         0.10         0.00         N/A           Banks and Personal Wealth Management         \$55         \$75         0.10         0.00         N/A           Business and International Banking Services         \$55         \$75         0.12         0.00         N/A		\$55	<b>\$75</b>	0.12	0.00	N/A
Bank Sales and Service: Expanding Customer Relationships         \$55         \$75         0.12         0.00         N/A           Banks as a Business         \$55         \$75         0.10         0.00         N/A           Banks and the Deposit Function         \$55         \$75         0.10         0.00         N/A           Banks and the Economy         \$55         \$75         0.10         0.00         N/A           Banks and Personal Wealth Management         \$55         \$75         0.10         0.00         N/A           Business and International Banking Services         \$55         \$75         0.12         0.00         N/A	Bank Payment System and	\$55	\$75	0.10	0.00	N/A
Banks as a Business         \$55         \$75         0.10         0.00         N/A           Banks and the Deposit Function         \$55         \$75         0.10         0.00         N/A           Banks and the Economy         \$55         \$75         0.10         0.00         N/A           Banks and Personal Wealth         \$55         \$75         0.10         0.00         N/A           Management         \$55         \$75         0.12         0.00         N/A           Business and International Banking Services         \$55         \$75         0.12         0.00         N/A	Bank Sales and Service: Expanding	\$55	\$75	0.12	0.00	N/A
Banks and the Deposit Function         \$55         \$75         0.10         0.00         N/A           Banks and the Economy         \$55         \$75         0.10         0.00         N/A           Banks and Personal Wealth Management         \$55         \$75         0.10         0.00         N/A           Business and International Banking Services         \$55         \$75         0.12         0.00         N/A	·	\$55	\$75	0.10	0.00	N/A
Banks and the Economy         \$55         \$75         0.10         0.00         N/A           Banks and Personal Wealth Management         \$55         \$75         0.10         0.00         N/A           Business and International Banking Services         \$55         \$75         0.12         0.00         N/A				0.10	0.00	·
Banks and Personal Wealth Management  Business and International Banking Services  \$55 \$75 \$0.10 0.00 N/A  \$55 \$75 0.12 0.00 N/A				0.10	0.00	N/A
Services Services	Banks and Personal Wealth	\$55	\$75	0.10	0.00	N/A
	Business and International Banking	\$55	\$75	0.12	0.00	N/A
	CFMP Exam Online Prep	\$895	\$1,045	N/A	N/A	N/A

Course Name	Member	Non-Member	Hrs.	Credit HRS	ICB
Community Bank Suite –	\$235	\$315	5.40	0.00	1 CAFP, CCTS, CFMP, CFSSP, CISP, CLBB,
Foundational Skills	,	,			CRCM, CRSP, CSOP, CTFA
Community Bank Suite – Onboarding Basics	\$295	\$405	1.12	0.00	0.25CAFP, CFSSP, CRCM
Digital Banker Suite	\$195	\$275	1	0.00	1.75 CFMP
Introduction to Banking	\$55	\$75	0.10	0.00	N/A
Lending as a Cornerstone of Banking	\$55	\$75	0.10	0.00	N/A
Safeguarding Bank Assets and the Nation	\$55	\$75	0.12	0.00	N/A
Safeguarding the Customer and the Bank	\$55	\$75	0.12	0.00	N/A
Ethical Issues for Bankers	\$55	\$75	0.25	0.00	1 CAFP, CCTS, CFMP, CFSSP, CISP, CLBB,
Robbery & Bank Security	\$95	\$130	0.45	0.00	N/A
Teller Basics Suite	\$150	\$200	5	0.00	N/A
MANAGEMENT SKILLS					•
ABA Supervisor/Team Leader Certificate	\$895	\$1,095	9.30	1	1.5 CAFP, CRCM; 1.25 CFMP, CSOP; 1 CCTS, CISP, CRSP, CTFA
Authentic Leadership	\$55	\$75	0.15	0.00	N/A
Building Collaborative Teams	\$55	\$75	0.15	0.00	N/A
Coaching	\$55	\$75	0.15	0.25	N/A
Communicating Visions	\$55	\$75	0.15	0.00	N/A
Community Bank Suite –	\$260	\$365	2.03	0.00	N/A
Management Skills	255	A75	0.15	0.05	N/4
Corrective Action	\$55	\$75	0.15	0.25	N/A
Effective Meetings	\$55	\$75	0.15	0.00	N/A
Employment Law	\$95	\$130	0.45	0.00	N/A
Employee Recognition	\$55	\$75	0.15	0.00	N/A
Empowerment	\$55	\$75	0.15	0.00	N/A
Interviewing	\$55	\$75	0.15	0.00	N/A
Leadership in Action Suite	\$195	\$275	1.15	0.00	N/A
Leveraging the Benefits of a Diverse Workforce	\$95	\$130	0.55	0.00	N/A
Management Essentials Suite	\$275	\$375	1.30	0.00	N/A
Managing Performance	\$55	\$75	0.15	0.25	N/A
Managing Change	\$55	\$75	0.15	0.25	N/A
Sexual and Workplace Harassment	\$95	\$130	1	0.00	N/A
PRODUCT KNOWLEDGE					
Consumer Credit Basics	\$55	\$75	0.20	0.00	N/A
Consumer Loan Process	\$55	\$75	0.20	0.00	N/A
Fundamentals of Consumer Lending Suite	\$95	\$130	0.40	0.00	N/A
Fundamentals of Small Business Banking Suite	\$95	\$130	0.45	0.00	N/A
Introduction to Analyzing Financial Statements	\$95	\$130	3.15	0.25	3.75 CLBB, CSOP, CTFA (FP)
Introduction to IRAs	\$95	\$130	0.30	0.00	0.75 CISP, CRSP, CSOP, CTFA (FP)
Personal Tax Returns Analysis	\$95	\$130	6.00	0.00	7.25 CLBB, CFTA(FP)
Small Business Products Suite	\$95	\$130	2.00	0.00	1.25 CLBB
Small Business Basics	\$55	\$75	0.20	0.00	N/A
Small Business Borrowing Suite	\$95	\$130	0.21	0.00	0.5 CFMP, 0.5 CLBB
Small Business Operating and Life Cycles	\$55	\$75	0.25	0.00	N/A
Understanding Business Bank Products Suite	\$135	\$185	0.41	0.00	N/A
Understanding Consumer Bank Products Suite	\$175	\$225	1.18	0.00	N/A
SALES SKILLS	l 				<u>'</u>

Course Name	Member	Non-Member	Hrs.	Credit HRS	ICB
Coaching to Support the Sales	\$55	\$75	0.20	0.00	N/A
Process					
Community Bank Suite – Sales Skills	\$95	\$135	0.35	0.00	N/A
Effective Referrals Suite	\$55	\$75	0.15	0.00	N/A
Essential Selling Skills Bundle	\$195	\$275	1.30	0.00	N/A
Event Networking	\$95	\$130	1	0.00	1.0 CFMP
Making the Client Call Suite	\$55	\$75	0.20	0.00	N/A
Overcoming Objections Suite	\$55	\$75	0.20	0.00	N/A
Referring Insurance and Annuity	\$95	\$130	1.25	0.00	N/A
Referring Investment Clients	\$95	\$130	035	0.00	N/A
Referring Trust Clients	\$95	\$130	0.40	0.00	N/A
Relationship Sales for Small Business	\$95	\$130	1.25	0.00	N/A
Clients Suite					
Relationship Sales Suite	\$55	\$75	0.15	0.00	N/A
Sales Planning Suite	\$55	\$75	0.20	0.00	N/A
Selling in a Social World	\$129	\$179	1.45	0.00	N/A
Selling in a Social World: Engage Your Audience	\$49	\$69	0.45	0.00	N/A
Selling in a Social World: Extend Your Reach	\$89	\$129	1	0.00	N/A
Successful Sales Campaigns	\$95	\$130	2	0.00	N/A
Tele-Consulting	\$95	\$130	1.35	0.00	N/A
Why Quality Customer Service Matters	\$55	\$75	0.35	0.00	N/A
WORKPLACE SKILLS					
Communication Basics Suite	\$55	\$75	0.20	0.00	N/A
Dealing Effectively with Co-workers	\$95	\$130	3	0.25	N/A
Essentials of Workplace Conduct	\$95	\$130	0.40	0.00	N/A
Improving Productivity	\$95	\$130	3	0.25	N/A
Managing Time at Work	\$95	\$130	1	0.00	N/A
Online Communication Suite	\$55	\$75	0.10	0.00	N/A
Presentation Skills Suite	\$95	\$130	0.50	0.00	N/A
Sexual and Workplace Harassment	\$95	\$130	0.40	0.00	N/A
The Power Network Habit Curriculum	\$249	\$399	2	0.00	3.25 CFMP
The SOS Habit	\$99	\$149	0.40	0.00	1.0 CFMP
Verbal Communication Suite	\$55	\$75	0.20	0.00	N/A
Written Communication Suite	\$55	\$75	0.20	0.00	N/A
		WEALTH MA	ANAGEMENT &	TRUST	
A Deeper Dive into Non-Financial Assets	\$135	\$185	0.25	0.00	0.50 CTFA
ABA Certificate in Asset Management	\$1795	\$2395	9.00	0.00	13 CTFA, 0.50 CISP, 8.5 CRSP, 8.00 CSOP
ABA Certificate and Fiduciary Relationship Management	\$1,295	\$1795	5.00	0.00	7.0 CTFA
ABA Certificate in Core Concepts for Fiduciary Advisors	\$895	\$1095	3.30	0.00	4.5 CTFA, 2.75 CCTS, 3.25 CRSP, 2.0 CSOP
ABA Certificate in Fiduciary	\$395	\$495	1.30	0.00	2.25 CTFA, 1.5 CCTS, CRSP, CSOP
Principles and Ethics  ABA Certificate in Fiduciary  Principles and Ethics	\$395	\$495	1.30	0.00	2.25 CTFA, 1.5 CCTS, CRSP, CSOP
ABA Certificate in Fiduciary Risk and Compliance	\$595	\$795	2.30	0.00	2.25 CTFA, 1.25 CSOP, 1.25 CISP, 1.25 CRSP
ABA Certificate in Integrated Wealth Planning and Advice	\$2,395	\$3,095	12	0.00	19.75 CTFA, 5.25 CISP, 4.75 CRSP, 0.75 CSOP
ABA Certificate in Trust Administration	\$895	\$1,195	5.30	0.00	7.75 CTFA, 2.75 CSOP, 1.50 CCTS, 0.75 CRSP
ABA Private Banker Certificate	\$3,495	\$4,595	28.30	0.00	23.5 CTFA, 7 CRSP, 11.75 CERP, 3.75 CSOP,

Course Name	Member	Non-Member	Hrs.	Credit HRS	ICB
ABA Health Savings Accounts (HSA) Expert Certificate	\$795	\$1,095	2.5	0.25	5.25 CISP, CRSP. CTFA
Alternative Investment Products	\$135	\$185	0.40	0.00	1.00 CRSP, CSOP, CTFA
Annuities	\$135	\$185	0.30	0.00	0.50 CRSP, CTFA
Account Acceptance and Termination	\$135	\$185	0.40	0.00	1.0 CSOP, CTFA (FID)
Applied Behavioral Finance	\$135	\$185	0.54	0.00	1.25 CTFA
Applying Fiduciary Principles and Ethics	\$135	\$185	0.30	0.00	0.75 CTFA, CCTS, CRSP, CSOP
Asset Allocation and Diversification	\$135	\$185	0.40	0.00	1.0 CRSP, CSOP, CTFA
Bond Selection and Analysis	\$135	\$185	0.50	0.00	1.0 CRSP, CSOP, CTFA (INV)
CTFA Exam Online Prep	\$895	\$1,045		N/A	N/A
Developing a Personalized Wealth Management Strategy	\$135	\$185	0.25	0.00	0.75 CTFA
Developing and Delivering a Compelling Personal Value	\$135	\$185	0.25	0.00	0.75 CTFA
Discretionary Distributions	\$135	\$185	0.40	0.00	1.0 CTFA (FID)
Duties and Powers of the Trustee	\$135	\$185	0.40	0.00	1.0 CSOP, CTFA (FID)
Economics & Markets	\$135	\$185	0.55	0.00	1.0 CRSP, CSOP, CTFA (INV)
Education Planning for Minors	\$135	\$185	0.40	0.00	1.0 CTFA
Effective Client Engagement Through "Wealth Personas"	\$135	\$185	0.25	0.00	0.75 CTFA
Emotional Intelligence for Wealth Advisors	\$135	\$185	0.15	0.00	0.5 CTFA
Engaging in Multigenerational Conversations with Clients	\$135	\$185	0.25	0.00	0.75 CTFA
Engaging with Centers of Influence	\$135	\$185	0.25	0.00	0.5 CTFA
Environmental Liabilities of Fiduciaries	\$135	\$185	0.25	0.00	0.50 CTFA
Estate and Probate Administration	\$135	\$185	0.45	0.00	1.00 CTFA
Estate Planning for the Business Owner	\$135	\$185	0.45	0.00	1.0 CTFA(FP)
Estate Planning for the Marital Deduction	\$135	\$185	0.40	0.00	1.0 CTFA (TAX)
Estate Planning Fundamentals	\$135	\$185	0.30	0.00	0.75 CTFA
Federal Estate Tax	\$135	\$185	0.35	0.00	0.75 CTFA
Fiduciary Compliance	\$135	\$185	0.20	0.00	0.5 CISP, CRSP, CSOP, CTFA
Fiduciary Income Tax	\$135	\$185	0.55	0.00	1.25 CISP, CTFA (TAX)
Fiduciary Ethics	\$135	\$185	0.35	0.00	0.75 CTFA, CCTS, CRSP, CSOP
Full Balance Sheet Advice	\$135	\$185	0.25	0.00	0.50 CTFA
Fundamentals of Insurance	\$175	\$225	0.70	0.00	1.0 CRSP, CTFA
Fundamentals of Life Insurance	\$175	\$225	0.55	0.00	1.0 CRSP, CTFA (FP)
Generation-Skipping Transfer Tax	\$135	\$185	1.00	0.00	1.25 CISP, CTFA (TAX)
Gift Strategy and Taxation	\$135	\$185	0.40	0.00	1.0 CRSP, CRFA
Importance of Proper Titling of Assets and Regular Titling Reviews	\$135	\$185	0.20	0.00	0.50 CTFA
Individual Income Tax	\$135	\$185	0.70	0.00	1.50 CTFA
Individual Retirement Accounts	\$135	\$185	0.30	0.00	0.75 CISP, CRSP, CSOP, CTFA
Interacting with Financial Advisors - Internal and Third-Party Broker Dealers	\$135	\$185	0.20	0.00	0.5 CTFA
Introduction to Fiduciary Risk Management and Compliance	\$135	\$185	0.25	0.00	0.5 CTFA
Introduction to Integrated Planning and Advice	\$135	\$185	0.20	0.00	0.5 CTFA

Course Name	Member	Non-Member	Hrs.	Credit HRS	ICB
Introduction to Investment Management	\$135	\$185	0.25	0.00	0.5 CTFA, CCTS, CRSP, CSOP
Introduction to Trust Administration	\$135	\$185	0.35	0.25	0.75 CCTS, CSOP, CTFA
Investment Policy	\$135	\$185	0.35	0.00	0.75 CRSP. CSOP. CTFA
Investment Products	\$135	\$185	1.00	0.00	1.25 CRSP. CSOP. CTFA
Investment Strategies for Inherited	\$135	\$185	0.20	0.00	0.50 CTFA
Wealth		•	0.20	0.00	0.30 CITA
Know Your Competition	\$135	\$185	0.30	0.00	0.75 CTFA
Life Insurance Policies	\$135	\$185	0.30	0.00	0.75 CRSP, CTFA
Managing the Dynamic Nature of Client Financial Needs	\$135	\$185	0.25	0.00	0.75 CTFA
Mastering the Art of Inquiry	\$135	\$185	0.30	0.00	0.75 CTFA
Managing Fiduciary Risk and Litigation	\$135	\$185	0.30	0.00	0.75 CISP, CRSP, CSOP, CTFA
Philanthropic Planning	\$135	\$185	0.35	0.00	0.75 CISP, CTFA
Planning Considerations for Life Insurance	\$135	\$185	0.37	0.00	0.75 CRSP, CTFA
Planning for Retirement	\$135	\$185	0.45	0.00	1.00 CISP, CTFA
Post-Mortem Tax Planning	\$135	\$185	1.14	0.00	1.5 CTFA
Preparing the 706	\$135	\$185	0.30	0.00	0.75 CTFA
Prudent Portfolio Management	\$135	\$185	0.25	0.00	0.50 CISP, CRSP, CSOP, CTFA (FID)
Qualified Retirement Plans	\$135	\$185	0.50	0.00	1.00 CISP, CRSP, CTFA
Selling Value	\$135	\$185	0.20	0.00	0.5 CTFA
Special Needs Trusts	\$135	\$185	035	0.00	0.75 CTFA (FP)
Stock Selection and Analysis	\$135	\$185	0.35	0.00	0.75 CRSP. CSOP. CTFA (INV)
Structure Analysis and Advice	\$135	\$185	0.20	0.00	0.75 CTFA
Sustainable and Responsible	\$135	\$185	0.25	0.00	0.50 CRSP, CTFA
The Role of a Private Banker	\$95	\$135	0.23	0.00	0.50 CTFA
Trust Fundamentals	\$135	\$185	0.30	0.00	0.75 CTFA, CRSP, CCTS
Types of Trust	\$135	\$185	0.30	0.00	0.75 CTFA
Understanding Fiduciary Principles	\$135	\$185	0.25	0.00	0.75 CTFA; CISP; CRSP; CSOP
Understanding Gender, Culture, and Generational Influences in Managing Wealth	\$135	\$185	0.25	0.00	0.5 CTFA
Understanding and Explaining Investment Performance	\$135	\$185	0.41	0.00	1.0 CTFA
	1	TRAI	NING SHORTS	<u> </u>	
Agricultural Lending					
Converting Cash to Accrual- adjusted Net Farm Income	\$75	\$95	0.20	0.00	0.5 CLBB
Credit Analysis Enhancements Using an Accrual-adjusted Income Statement and Statement of Owner Equity	\$75	\$95	0.20	0.00	0.5 CLBB
Importance of Preparing Accrual- adjusted Income Statements	\$75	\$95	0.20	0.00	0.5 CLBB
Obstacles to Preparing an Accrual- adjusted Income Statement	\$75	\$95	0.20	0.00	0.5 CLBB
Practical Steps to Calculate Net Income and Owner Equity for Agricultural Producers	\$300	\$380	1.40	0.00	2.5 CLBB
Compliance Lending					
Changed Loans: Is the Borrower Entitled to the Right of Rescission	\$75	\$95	0.18	0.00	0.50 CRCM, 0.50 CERP
Consumer Loans: To Modify or Refinance?	\$75	\$95	0.20	0.00	0.50 CRCM, 0.50 CERP
Fair Lending Implications for Changing Loan Terms	\$75	\$95	0.26	0.00	0.75 CRCM, 0.75 CERP

Course Name	Member	Non-Member	Hrs.	Credit HRS	ICB
Filing CTRs for Multiple Transactions Conducted by A Single Transactor	\$75	\$95	0.21	0.00	0.50 CRCM, 0.50 CERP
HMDA and CRA Reporting Requirements for Refinancing or Modifying Loans	\$75	\$95	0.25	0.00	0.50 CRCM, 0.50 CERP
How and When Do I Report Loan Changes in Terms Under FCRA?	\$75	\$95	0.16	0.00	0.50 CRCM, 0.50 CERP
Consumer Loans: To Modify or Refinance?	\$75	\$95	0.20	0.00	0.50 CRCM, 0.50 CERP
Loan Modification or Refinance Flood Insurance Requirements	\$75	\$95	0.25	0.00	0.50 CRCM, 0.50 CERP
Processing Closed-End Real Estate- Secured Loan Notices of Error	\$75	\$95	0.20	0.00	0.50 CRCM, 0.50 CERP
Processing Credit Card Billing Errors and Unauthorized Use Claims	\$75	\$95	0.28	0.00	0.75 CERP, 0.75 CERP
Processing Debit Card Disputes and Errors	\$75	\$95	0.27	0.00	0.75 CRCM, 0.75 CERP
Real Estate Appraisal at Loan Modification or Refinance	\$75	\$95	0.22	0.00	0.50 CRCM, 0.50 CERP
Timely Decision Communication	\$75	\$95	0.19	0.00	0.50 CRCM, 0.50 CERP
Understanding and Processing Closed-End Real Estate	\$75	\$95	0.22	0.00	0.50 CRCM, 0.50 CERP
Understanding and Processing Open-End Line of Credit Disputes and Errors	\$75	\$95	0.23	0.00	0.50 CRCM, 0.50 CERP
Understanding Credit Card Billing	\$75	\$95	0.19	0.00	0.50 CRCM, 0.50 CERP
Understanding Debit Disputes and EFT Errors	\$75	\$95	0.17	0.00	0.50 CRCM, 0.50 CERP
Understanding the Difference Between Complains and Disputes	\$75	\$95	0.16	0.00	0.50 CRCM, 0.50 CERP
What is a Closed-End Real Estate- Secured Loan Notice of Error?	\$75	\$95	0.14	0.00	0.50 CRCM, 0.50 CERP
Marketing					
Campaigns in Community Banking	\$75	\$95	0.10	0.00	0.25 CFMP
Case Study in Community Banking	\$75	\$95	0.18	0.00	0.50 CFMP
Connecting with Your Audience in Community Banking	\$75	\$95	0.17	0.00	0.50 CFMP
Content Opportunities in Community Banking	\$75	\$95	0.15	0.00	0.50 CFMP
Conversion in Community Banking	\$75	\$95	0.23	0.00	0.50 CFMP
Marketing in the Age of Distraction	300\$	\$380	1.23	0.00	2.25 CFMP
Retail					
Body Language Basics – Part 1 & 2	\$500	\$660	0.80	0.00	N/A
Body Language Basics – Part 1	\$300	\$380	0.48	0.00	N/A
Body Language Mistakes & Gender Differences	\$75	\$95	0.18	0.00	N/A
Learning a New Language	\$75	\$95	0.10	0.00	N/A
Reading Body Language	\$75	\$95	0.12	0.00	N/A
Understanding Nonverbal Communication	\$75	\$95	0.7	0.00	N/A
Body Language Basics – Part 2	\$300	\$380	0.32	0.00	N/A
Body Language in Business	\$75	\$95	0.7	0.00	N/A
Four Steps to Better Body Language	\$75	\$95	0.7	0.00	N/A
Four Ways to Detect a Lie  Matching Your Words to Your	\$75 \$75	\$95 \$95	0.9	0.00	N/A N/A
Movement	675	¢0.F	0.00	0.00	
Eight Essential Crisis Communication	\$75	\$95	0.20	0.00	0.50 CFMP

Course Name	Member	Non-Member	Hrs.	Credit HRS	ICB
Five Reasons Why Online Appointment Scheduling is Essential	\$75	\$95	0.13	0.00	N/A
Game Plan for a Healthy Branch Experience	FREE	\$95	0.18	0.00	0.50 CFMP
The Retail Playbook You Need to Succeed	\$300	\$380	1	0.00	1.25 CFMP
Tips for Winning One-onOone Meetings	\$75	\$95	0.10	0.00	0.25 CFMP
SANS Cybersecurity Training	•			•	
SANS Security Awareness Suite	\$55	\$75	0.35	0.00	1.0 CAFP, 1.0 CFSSP
SANS Security Awareness Interactive Games Suite	\$95	130	0.54	0.00	1.0 CAFP, 1.0 CFSSP
SANS Cybersecurity Compliance Suite	\$95	\$130	0.38	0.00	0.75 CAFP, 0.75 CFSSP
SANS Security Awareness – Special Considerations Suite	\$55	\$75	0.21	0.00	N/A
SANS Data Security IT Training Suite	\$55	\$75	0.19	0.00	0.5 CAFP, 0.5 CFSSP

### **CFT EASY LINKS!**



**CFT's Homepage** 



Instructor-led Classes



Self-Paced Classes



**Webinars** 

Virtual & In-Person
Seminars



Diplomas,
Certificates &
Degrees



Registration Forms





# Achievable FINRA

COURSE LIST	
Security Industry Essentials (SIE)	\$74
Series 6	\$99
Series 7	\$149
Series 63	\$59
Series 65	\$199
Series 66	\$199

Bundle: SIE + Series 7 \$199

Bundle: All courses \$349

Course access is valid for a year from purchase date.

Enroll at <a href="https://achievable.me/enroll/cftintl">https://achievable.me/enroll/cftintl</a>

#### STUDYING WITH ACHIEVABLE

- 1. Track your progress on your Dashboard
- 2. Tap Next to read textbook content and watch any videos
- 3. **Take the quiz** at the end of each page to reinforce the concepts
- 5. Review what you've learned and repeat through all the content
- 6. Take full length Practice exams to benchmark your knowledge
- 7. Ace the exam!

# IMPROVING YOUR MEMORY RETENTION

What makes Achievable special is something called adaptive learning. As you study with Achievable, the system learns about you and personalizes the study program to your strengths and weaknesses. We then optimize for your memory retention by scheduling your reviews at the optimal time.





Completing your reviews daily gives you the maximum memory benefit.

### **CFT DISTANCE LEARNING REGISTRATION FORM**

# COMPLETE FORM WITH APPROPRIATE SIGNATURES FOR BILLING

Name on Card/ Billing Address

2 SCAN & EMAIL TO: claguna@mdc.edu

3

Or FAX TO: 305-237-7587

Amount: \$

The Center for Financial Training does not discriminate on the basis of race color, gender, age, and national or ethnic origin. This document may contain privileged and/or confidential information. It is intended solely for the use of CFT and will not be shared without written permission.

privileged and/or confidential in	formation. It is intended solely for the use of	CFT and will not be shared withou	of written permission.
Student Name:			
Your Bank/Organization Title:		Department:	
Organization Name:		Work #:	
E-mail address :(Required) required for	confirmations)	Cell & Home #:	
Bank/Organization Address:		City/State/Zip:	
Shipping and Correspondence Preference:Company Address Above orHome Address:			
STUDENT SIGNATURE:		DATE:	
I certify the accuracy of all information on this applicat also authorize CFT to release a copy of my final grades read and agree to all of CFT' registration policies and pieces.  Registration must be received 7 days prior to sta call (305)237-3051 or visit our website at <a href="https://www.cfm">www.cfm</a>	and/or academic record (transcript) at the end of procedures, including the withdrawal policy and the control of course. When faxing please confidence in the course with the course of course.	the term to the representative of CFT ar the academic integrity statement as ou	nd/or the company named above. I have itlined in the schedule or other marketing
What you need to access these cours		idar An anasila	a a a unit
A computer with optional printer	An Internet Service Prov		
COUR	<u>2F (2)</u>	CATALOG NUMBER	DATE
YOUR EDUCATIONAL GOAL: Please indicate below wi	hich CFT Diploma and/or Certificate you intend t	to earn.	
(DIPLOMA/CERTIFICATE)	(Please see https:/	//cftintl.org/diplomas-certificates-and-c	college-programs/ for your options)
Refunds: Instructor-led online classes, there is a 100% refund for Refunds will be made (less \$200 cancellation fee) if a v You may request a transfer only once for a fee of \$200. once you have registered for any self-paced online country.  REGISTRATION	written request is received within 10 business days . There are no refunds for cancellations received n	from the course start date and the text nore than 10 business days after the sta er programs, see individual schedule to	tbook is returned (unmarked) to CFT/ABA it of the class. No withdrawal is accepted r policies.
CHOOSEONE: *Bill bank	A check is enclosed	□ M/C	VISA
*Person/Signature authorizing billing			
(By signing this form, I accept full responsibility for all monies due to	SFCFT and agree to adhere to SFCFT registration policies as	stated in the SFCFT program schedule and/or m	narketing pieces.)
This authorizes CFT to charge my Credit Card #:	-	Exp. Date:	CV\$ #

Signature of Cardholder