

Financial Counseling Certification Program (FiCEP)

Program Overview

This is an enhanced and unique training program for credit union staff that combines the convenience of a self-study program with group hands-on learning.

Program begins in late July and includes bi-weekly webinars to help students stay on track with their studies.

An in-person group training and proctored testing session will be held after Part I and Part II of the program.

Group Training and Support

- Webinars are recorded and accessible at any time
- Two in-person group training and proctored testing sessions include review, networking, and sharing of best practices
- Special training and coaching to help participants develop a detailed vision and plan for financial counseling at your CU

*In-person training sessions & proctored testing will take place in all 3 Cornerstone region states IF each state has a minimum of 5 participants.

Welcome Webinar

Week of July 30, 2019

In-Person Training and Testing Dates

Part I: September 26th - Little Rock & OK City
September 27th - Dallas

Part II: December 5th - Little Rock & OK City
December 6th - Dallas

Become a Certified CU Financial Counselor, CCUFC

Students learn skills and knowledge necessary to assist and empower members to improve their financial well-being.

- ✓ Acquire skills to help those experiencing financial difficulties
- ✓ Reduce delinquencies & charge-offs
- ✓ Grow product and service revenue
- ✓ Demonstrate the credit union difference
- ✓ Attract new members

FiCEP Part I Guided Self-Study

- Introduction to Financial Counseling
- Financial Counseling Essentials
- Special Issues in Financial Counseling
- Using Communication Skills During Financial Counseling

FiCEP Part II Guided Self-Study

- Taxes, Insurance, and Investments
- Controlling Living Expenses
- Money, Attitudes, and Behaviors
- Retirement and Personal Financial Preparedness

Low Cost!

The Cornerstone Credit Union Foundation has provided funds to reduce program cost.

- Students are responsible for transportation to and from live group training and testing sessions.
- \$550 per person, a set of books
 - If 2 students share a set of books, the second student pays \$200. Sharing is 2 users to 1 purchase ratio only.
- \$975 per student for non-member CUNA credit unions.
 - If 2 students share a set of books, the second student pays \$200. Sharing is 2 users to 1 purchase ratio only.
- \$200 per student for CUNA on-line package credit unions

I Want to Participate!

- To register, visit www.cscuf.coop/events.html
- A \$250 fee will be charged to students who do not complete the full program.
- Deadline to register is **Friday, June 28, 2019**

Questions: Contact Paula Upchurch, Cornerstone Credit Union Foundation
pupchurch@cscuf.coop or (469) 385-6447