



Financial Counselor Training and Certification

Help your members build a strong financial future

Training can be used for:

- One-on-one counseling
- Community seminars
- Enhancing member interactions
- Enhancing lending and collections



For all credit union staff:

- Branch management
- Member service
- Lending/collections
- Community educators



REAL Solutions training provided with funding from the Michigan Credit Union Foundation



Become a Certified Credit Union Financial Counselor. Join the 270 Michigan credit union professionals that have attended this program in the last four years.

This unique financial counseling training program for credit union staff combines the lower cost and convenience of a self-study program with the group hands-on learning and networking of a live CUNA school.

Register by April 30, 2014 to participate in the Guided Self-Study Training Program

The 2014 program runs from May to October
Contact MCUL Financial Education Manager Beth Troost at (800)262-6285, ext.453 or at Beth.Troost@mcul.org.

CUNA's Financial Counseling Certification Program

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 and Understanding Consumer Credit
- Matching Values to Money
- Retirement and Special Issues

REAL Solutions and MCUL & Affiliates Group training, testing and support

- Bi-Weekly Group conference calls to help you stay on track and ask questions as you study each module.
- Live group Training Sessions in Michigan for Part I & Part II:
 - Hands-on training with experienced counselors
 - Network and share best practices
 - Proctored testing as a group or individually
- Ongoing networking and support with group communication to help you put your new skills into practice.



Financial Counseling Guided Self-Study Training Program

Please complete the information below with signatures and return this registration form **by April 30, 2014**. For additional information about the training, contact MCUL Financial Education Manager, Beth Troost at beth.troost@mcul.org or by phone at (800)262-6285, ext. 453.

Curriculum Modules: **\$416 is the cost for the complete curriculum. CUNA will invoice your credit union for this amount after registration.**

FiCEP Part I

- Intro to Financial Counseling (Module 1)
- Financial Counseling Essentials (Module 2)
- Special Issues in Fin. Counseling (Module 3)
- Using Communication Skills During Financial Counseling (Module 4)

FiCEP Part II

- Taxes, Insurance, and Investments (Module 1)
- Controlling Living Expenses and Understanding Consumer Credit (Module 2)
- Matching Values to Money (Module 3)
- Retirement and Special Issues (Module 4)

Curriculum Sharing Option: Module books may be shared with an additional registrant at your credit union. One set of tests is free with each set of modules ordered. If sharing modules, CUNA charges an additional test fee of \$30 per module for additional participants which will total \$240 for all eight tests/modules.

REAL Solutions Training Sessions: The REAL Solutions fee of \$357 per participant is funded by the Michigan Credit Union Foundation. Therefore, there will be **no additional participation fee** to credit unions for the group sessions or webinars. Bi-weekly webinars and live group training sessions will be conducted by REAL Solutions, the signature program of the National Credit Union Foundation. Approximate schedule:

- Bi-Weekly webinars will be held from May to October: One orientation webinar and eight bi-weekly webinars; one for each module – webinars will be recorded.
- Two live group sessions will be held for training and testing. These will be one day sessions scheduled in July or August for part one and in October for part two with exact dates and locations to be announced.

The **Michigan Credit Union Foundation** is proud to support your credit union’s participation in the 2014 REAL Solutions FiCEP Training. As part of your participation in this program, you will be asked to periodically report on the counseling activities you complete at your credit union once you become a Certified Credit Union Financial Counselor. This data will be used to show the impact credit union financial counselors are having on their membership and communities. By participating in this program, you agree that your credit union’s name may be used in MCUL & Affiliates and MCUF publications and marketing.

Signature of Credit Union CEO: _____

Signature of Credit Union Participant: _____

Participant Name: _____ Title: _____

Credit Union: _____ CUID: _____

Shipping Address: _____

PH: _____ E-mail: _____

____ I do not need to purchase modules because I will be sharing with (name of co-worker): _____

Please return this registration form to kathryn.hall@mcul.org or fax to (517) 482-3762 by April 30, 2014.

Please do not send payment at this time. CUNA will invoice your credit union and distribute the curriculum modules.