



Financial Counselor Training and Certification

Help your members build a strong financial future

Training can be used for:

- Enhancing all member interactions
- One-on-one counseling
- Financial education
- Enhancing lending and collection activities



For all credit union staff:
Branch management
Member service
Lending/collections
Community educators

Michigan Credit Union Foundation Funding Makes Training Affordable!

- \$416 discounted curriculum fee.
- Free webinars and group training and testing sessions.
- Full scholarships for up to 40 small credit unions.

Become a CUNA Certified Credit Union Financial Counselor (CCUFC) and help members reach their financial goals!

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

Register by April 7 to participate in the 2017 Enhanced Self-Study Training Program

The 2017 program runs from June to October

Contact Beth Troost to apply
(800)262-6285, ext.453 or at Beth.Troost@mcu.org.

CUNA's Financial Counseling Certification Program (FiCEP)

Designed for all credit union staff who are committed to helping members gain control of their financial future, FiCEP enhances credit union services.

- Proven financial counseling skills that become a part of your credit union's culture.
- Written so that all staff levels can offer financial counseling during every member interaction.
- CCUFC Certification satisfies members' needs as they continually look for the value of the credit union.
- Differentiate your credit union by having certified financial counselors.
- Help members transform the way they deal with money through financial counseling.

Group Training, Testing, and Support

- Bi-weekly group webinars help you stay on track and be able to ask questions as you study each module.
- Live group training sessions in Michigan for Part I & Part II provide hands-on training with experienced counselors, networking opportunities and proctored group testing.
- Ongoing networking and support help you put your new skills into practice.





Financial Counseling Guided Self-Study Training Program Scholarship Application and Registration

Please complete the information below with signatures and return this registration form **by April 7, 2017**. For additional information please contact Beth Troost at Beth.Troost@mcul.org or by phone at (800)262-6285, ext. 453.

Cost of Curriculum Modules: \$416 is the discounted 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: Each set of modules may be shared with one additional registrant at your credit union. One set of tests is free with each set of modules purchased. If sharing modules, CUNA charges a testing fee of \$100 for the additional participant.

Your MCUF Scholarship pays for the training enhancements from the National Credit Union Foundation: This 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 two live group sessions or the eight webinars. Participation in these training enhancements is strongly recommended but not mandatory for certification.

- Bi-Weekly webinars will be held from June 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 or November 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 Enhanced FiCEP Training. As part of your participation in this program, you may 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 will be used to show the impact credit union financial counselors are having on their membership and communities. By participating in this program, you acknowledge this MCUF scholarship and agree that your credit union’s name may be used in MCUL & Affiliates and MCUF publications and marketing.

Signature of Credit Union CEO: _____

Participant Name: _____ Title: _____

Credit Union: _____ CUID: _____

PH: _____ E-mail: _____

Small Credit Union Scholarship: Check to apply for a scholarship. One applicant from each of the first 40 small credit unions (with assets of \$50M or less) to apply will receive a full scholarship to participate at no cost.

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

Please return this registration form to Stephanie.Kuchuk@mcul.org by April 7, 2017.

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