

FINANCIAL COUNSELOR TRAINING AND CERTIFICATION

Become a CUNA Certified Credit Union Financial Counselor

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

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 by:

- Proven financial counseling skills 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;
- Differentiates the credit union with certified financial counselors;
- Helps members transform the way they deal with money through in-person counseling.

Become a certified Credit Union Certified Financial Counselor (CCUFC) and be ready and able to help members reach their financial goals.

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:

- Hands-on training with experienced counselors
- Network and share best practices
- Proctored testing as a group or individually

Ongoing networking and support help you put your new skills into practice.

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

Michigan Credit Union Foundation Funding Makes Training Affordable

- \$416 discounted curriculum plus free group training and testing.
- Full scholarships available for small credit unions.



Register by April 12 to participate in the 2019 Enhanced Self-Study Training Program

The 2019 program runs from May to October

Contact **Kathryn Hall** to apply 800.262.6285, ext.470 or at Kathryn.Hall@mcu.org





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 12, 2019**. For additional information please contact Kathryn Hall at Kathryn.Hall@mcuf.org or by phone at (800)262-6285, ext. 470.

Cost of Curriculum Modules: \$416 is the discounted cost for the complete curriculum.

FiCEP Part 1 test covers these modules:

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 2 test covers these modules:

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: While full registration is suggested for participants, 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.

The Michigan Credit Union Foundation covers the costs of the webinars and live training and testing sessions, \$375 per participant. Therefore, there will be **no additional participation fee** to credit unions for these program enhancements.

Participation in these training sessions is strongly recommended but not mandatory for certification.

- **Bi-Weekly webinars** from May to October: One orientation webinar and one webinar for each of the eight modules. Webinars will be recorded for access.
- **Two live group sessions** will be held for training and testing. These 6 hour sessions will be scheduled in July for part 1, and in October for part 2, with specific 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 how your credit union is utilizing your skills 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 funding 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 Curriculum Scholarship: Check to apply for a scholarship. A limited number of full scholarships are available small credit unions (with assets of \$50M or less).

Sharing: 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@mcuf.org by April 12, 2019.

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