

FINANCIAL COUNSELOR CERTIFICATION TRAINING

Michigan Enhanced Program

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 training 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 Financial Counselor (CCUFC) and be ready and able to help members reach their financial goals.

Group Training, Testing and Support

Enhancements provide additional training, resources and guidance. These include 8 interactive webinars, study guides, test preparation sessions, access to counseling documents, live training, and two proctored testing sessions.

Live Group Training Session Expands Your Knowledge and Skills:

- Hands-on training with experienced counselors and expert speakers
- Network and learn best practices

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

- \$390 discounted curriculum cost plus **free** group training, testing and resources.



Register by April 17 to participate in the 2020 Enhanced Self-Study Training Program

The 2020 program runs from May to October

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





Financial Counseling Certification Training Michigan Enhanced Program Registration

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 (Module 2)
Money, Attitudes & Behaviors (Module 3)
Retirement & Personal Financial Preparedness (Module 4)

Cost of Curriculum Modules: \$390 (plus shipping cost) is the discounted cost for the complete CUNA curriculum.

Curriculum Sharing Option: While full registration is suggested for participants, sharing or utilizing used curriculum is permissible (must be the current 4th edition modules). One set of tests is free with each set of modules purchased. CUNA charges a testing fee of \$100 for participants who are sharing or reusing modules.

No Additional Cost for Training Enhancements (a \$375 value): The Michigan Credit Union Foundation covers the costs of the webinars and live training and testing sessions. Therefore, there will be no additional participation fee to credit unions for these program enhancements. Participation in these training enhancements is strongly recommended but not mandatory for certification:

- **Bi-weekly webinars** from June to September: One webinar for each of the eight CUNA modules and two video test preparation sessions. Webinars will be recorded and posted for ease of access.
- **Two live group proctored testing sessions:** In July for part 1, and in September for part 2, with specific dates and locations to be announced. Students may also arrange for local individual test proctoring on their own.
- **One full-day live training enhancement session:** With expert speakers in September or October (location and date TBD).

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: _____

Sharing/Reusing: I do not need to purchase modules because I will be sharing or reusing CUNA 4th edition modules.

Please return this registration form to Kathryn Hall by April 17, 2020.

Contact for registration or more information: Kathryn.Hall@mcul.org / 800-262-6285, ext. 470

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