

Unmatched Financial Training for over 110 Years



Independent Study Courses

Course Title	Credits	Length	Fee
Accounting II	3	4 months	\$575
Advertising	3	4 months	\$575
Agricultural Lending	3	4 months	\$575
Analyzing Financial Statements*	3	4 months	\$575
Bank Management	3	4 months	\$575
Banking Today ABA	½	3 months	\$150
Business Communication*	3	4 months	\$575
Business Math*	3	4 months	\$575
Commercial Lending*	3	4 months	\$575
Communication Skills for Business	2	3 months	\$525
Consumer Lending	3	4 months	\$575
Customer Service Excellence	2	3 months	\$525
Customer Service Innovation	2	3 months	\$525
e-Commerce	3	4 months	\$575
Economics for Bankers*	3	4 months	\$575
Effective Business Writing	2	3 months	\$525
Employment & Labor Law	3	4 months	\$575
Financial Accounting*	3	4 months	\$575
Financial Planning	3	4 months	\$575
General Accounting	3	4 months	\$575
Human Relations*	3	4 months	\$575
Human Resource Development	3	4 months	\$575
Human Resource Management*	3	4 months	\$575
Human Resource Selection	3	4 months	\$575
International Financial Management	3	4 months	\$575
Interviewing & Hiring Techniques	¼	1 month	\$375
Law & Banking: Applications*	3	4 months	\$575
Law & Banking: Principles*	3	4 months	\$575
Leading Your People to Success	2	3 months	\$525
Management*	3	4 months	\$575
Managing Human Resources	3	4 months	\$575
Managing Performance & Productivity	2	3 months	\$525
Marketing Financial Services	3	4 months	\$575
Money & Banking	3	4 months	\$575
Motivating Your Staff	¼	2 months	\$375
Organizational Behavior*	3	4 months	\$575
Principles of Banking	3	4 months	\$575

Course Title	Credits	Length	Fee
Project Management	3	4 months	\$575
Project Management: New Product Development	3	4 months	\$575
Project Management: The Managerial Process	3	4 months	\$575
Real Estate Appraisal*	3	4 months	\$575
Real Estate Finance*	3	4 months	\$575
Real Estate Law*	3	4 months	\$575
Residential Mortgage Lending*	3	4 months	\$575
Sales Excellence	2	3 months	\$525
Selling Fundamentals	3	4 months	\$575
Statistics*	3	4 months	\$575
Supervision*	3	4 months	\$575
Teller Operations	2	3 months	\$525
The 21 st Century Supervisor	2	3 months	\$525
The Future of Business	3	4 months	\$575
Today's Teller ABA	2	3 months	\$150
Wills, Trust & Estate Administration	2	3 months	\$525

FAQ

Flexible Format: Independent Study is designed for students who prefer a flexible schedule. After the registration and payment are received, textbook and accompanying materials are mailed, and a regional content expert is assigned as your instructor.

Pace: Students have **one to four months** to complete the coursework (see Length). Working at your own pace, your instructor will guide you in completing chapter assignments, quizzes and exams. Curriculum and materials are the same as an in-person course.

Registration: Register anytime at your convenience. Courses begin once student registers and receives materials. To get started, complete the registration form and mail with payment (including

\$15.00 processing fee per course) to the CFT office. Note: Registrations will not be processed until payment is received.

Withdrawal Policy: Withdrawals must be sent in writing. Students will be assessed a \$100 fee for withdrawals received after the registration has been processed. Refunds will not be issued once course materials have been sent.

***ACE Credits:** College transfer recommendation status by the American Council on Education. Contact the CFT office for more information.

Course Title	Fee
Compliance Online Training for Compliance Professional	
Anatomy of a Regulation for Compliance Professionals	\$275
BSA/USA Patriot Act for Compliance Professionals	\$275
Community Reinvestment Act for Compliance Professionals	\$275
Credit Card Regulations for Compliance Professionals	\$275
Digital Compliance for Compliance Professionals	\$275
Electronic Funds Availability Act (Reg E) for Compliance Professionals	\$275
Elements of a Compliance Program for Compliance Professionals	\$275
Equal Credit Opportunity Act (ECOA) for Compliance Professionals	\$275
Expedited Funds Availability Act (Reg CC) for Compliance Professionals	\$275
Fair Credit Report Act (FCRA) for Compliance Professionals	\$275
Good Faith Estimate and HUD-1 for Compliance Professionals	\$95
Home Mortgage Disclosure Act (HMDA) for Compliance Professionals	\$275
Loans to Insiders (Reg O) for Compliance Professionals	\$275
National Flood Insurance Regulations for Compliance Professionals	\$275
Office of Foreign Assets Control (OFAC) for Compliance Professionals	\$275
Privacy/Information Sharing for Compliance Professionals	\$275
Real Estate Settlement Procedures Act for Compliance Professionals	\$275
Reg Z Ability to Repay (ATR) and Qualified Mortgage (QM) for Compliance Professionals	\$275
Reg Z Closed-End Credit for Compliance Professionals	\$275
Reg Z Open-End Credit for Compliance Professionals	\$275
Reserve Requirements for Depository Institutions Act (Reg D) for Compliance Professionals	\$275
Servicemembers Civil Relief Act (SCRA) for Compliance Professionals	\$275
Truth in Savings Act (Reg DD) for Compliance Professionals	\$275
Unfair, Deceptive or Abusive Acts or Practices (UDAAP) for Compliance Professionals	\$275
Digital Marketing	
Marketing in a Digital World (includes all 6 modules listed below)	\$899
Marketing in a Digital World: Social Campaign (includes only 3 modules listed below)	\$459
The Power of Facebook	\$189
Leveraging LinkedIn	\$189
Strategic Twitter	\$189
Marketing in a Digital World: Digital Campaigns (includes only 3 modules listed below)	\$459
Build Your Campaign	\$189
Find Your Audience	\$189
Search Engine Optimization	\$189

Course Title	Fee
General Banking	
Banking Today	\$95
Consumer Credit Products	\$95
Ethical Issues for Bankers	\$95
Intro to IRAs	\$95
Robbery & Bank Security	\$95
Teller Basics	\$150
Understanding Bank Products	\$95
General Lending	
Fundamentals of Consumer Lending	\$95
Fundamentals of Small Business Banking	\$95
Introduction to Analyzing Financial Statements	\$95
Personal Tax Return Analysis	\$95
Commercial Lending	
Understanding Business Borrowers	\$150*
Analyzing Business Financial Statements & Tax Returns	\$150*
Analyzing Personal Financial Statements & Tax Returns	\$150*
Qualitative Analysis & Determining a Credit Risk Rating	\$150*
Loan Structuring, Documentation, Pricing, & Problem Loans	\$150*
Lending - Advanced	
The Lending Decision Process (Series 1-6 below)	\$720
<i>Series 1: Industry, Management, & Economic Influences</i>	\$100
<i>Series 2: Interpreting Quality of Financial Reports & Accounts</i>	\$100
<i>Series 3: Analyzing the Company's Financial Performance & Financial Condition</i>	\$200
<i>Series 4: The Cash Cycle, Seasonality & Discovering Borrowing Causes and Repayment Sources</i>	\$150
<i>Series 5: Analyzing Cash Flow Statement & Measuring Repayment Ability</i>	\$150
<i>Series 6: Using Financial Projections to Fine Tune the Credit Analysis</i>	\$150
The Commercial Real Estate Lending Decision Process (Series 1-6 below)	\$720
<i>Series 1: Types of CRE Loans, Risk Areas & Performance Drivers</i>	\$125
<i>Series 2: The CRE Underwriting Process</i>	\$125
<i>Series 3: Financing Different Types of Commercial Properties</i>	\$125
<i>Series 4: Understanding & Evaluating Leases, Appraisals and Environmental Assessments</i>	\$175
<i>Series 5: Loan Structure & Documentation Considerations</i>	\$125
<i>Series 6: Construction Lending</i>	\$175

Visit our website for course descriptions.

WWW.CFTNCS.ORG

Pace Students have 6 months for individual courses or 12 months for ABA certificates.

Registration Register anytime at your convenience. To get started, complete the Registration Form and mail or fax it to the CFT office.

Course Title	Fee
Management & Leadership	
Coaching for Success	\$95
Corrective Action	\$95
Hiring the Best	\$95
Leveraging the Benefits of a Diverse Workforce	\$95
Managing Change	\$95
Managing Employee Performance	\$95
Managing Employee Relations	\$95
Rewards & Recognition	\$95
Residential Lending	
Appraisal Procedures	\$95
Basics of Mortgage Processing	\$95
Completing the HUD-1	\$95
Discovering FHA Programs	\$95
Elements of Title Insurance	\$95
Essentials of Mortgage Lending	\$95
Explaining Loan Modifications	\$95
Gathering the Facts on Mortgage Fraud	\$95
Handling Mortgage Inquiries & Making Referrals	\$95
Mortgage Customer Counseling & Prequalification	\$95
Preparing the Closing Disclosure	\$95
Preparing the Loan Estimate	\$95
Processing & Underwriting Credit	\$95
Processing Income & Assets	\$95
Reviewing the Appraisal Report	\$95
TILA-RESPA Integrated Disclosures	\$55
Risk Management	
Cybersecurity Management	\$275
Elements of an Operational Risk Management Program	\$275
Fraud & Criminal Threats	\$275
Incident Management & Resilience	\$275
Operational Risk Model Management	\$275
Oversight & Management of Operational Risk	\$275
Payments & Settlements	\$275
Physical Security	\$275

Course Title	Fee
Risk Management (con't)	
Regulatory Exam Management	\$275
Risk & Control Self-Assessment (RCSA)	\$275
Vendor Risk Management	\$275
Sales Skills	
Building & Retaining Customer Relationships	\$95
Effective Client Referrals	\$95
Event Networking	\$95
Introduction to Relationship Selling	\$95
Needs-Based Selling	\$95
Referring Insurance & Annuity Clients	\$95
Referring Investment Clients	\$95
Referring Trust Clients	\$95
Revitalizing Customer Service	\$95
Sales Coaching	\$95
Successful Sales Campaigns	\$95
Tele-Consulting	\$95
Small Business Lending	
Calling on Small Business Customers	\$95
Credit Products for Small Businesses	\$95
Deposit Products & Services for Small Businesses	\$95
Fundamentals of Small Business Banking	\$95
Introduction to Analyzing Financial Statements	\$95
Relationship Selling to Small Business Customers	\$95
Retirement Products for Small Businesses	\$95
Servicing & Growing Small Business Relationships	\$95
Small Business Borrowing	\$95
Workplace Skills	
Dealing Effectively with Co-Workers	\$95
Effective Telephone Communication	\$95
Effective Written Communication	\$95
Essentials of Workplace Conduct	\$95
Improving Productivity	
Managing Time at Work	\$95
Meetings that Work	\$95
Presentation Skills	\$95
Sexual Harassment in the Workplace	\$95

Withdrawal Policy

No refunds once a student has been enrolled in a self-paced online course.

Visit our website for course descriptions.

WWW.CFTNCS.ORG

Self-Paced Online Courses

ABA Online Certificates

Course Title	Fee
Wealth Management & Trust	
A Guide to Ethics in Fiduciary & Trust Activities	\$95
A Guide to Ethics in Financial Planning	\$95
A Guide to Ethics in Investments	\$95
A Guide to Ethics in Tax Law & Tax Planning	\$95
Account Acceptance & Termination	\$175
Asset Allocation & Portfolio Management	\$175
Basic Characteristics of a Trust	\$175
Bond Selection & Analysis	\$175
Discretionary Distributions	\$175
Duties & Powers of the Trustee	\$175
Economics & Markets	\$175
Education Planning Solutions for Minors	\$175
Estate & Guardian Administration	\$175
Estate Planning to Achieve Client Goals	\$175
Estate Planning for Charitable Giving	\$175
Estate Planning for IRAs & Qualified Plan Balances	\$175
Estate Planning for the Marital Deduction	\$175
Estate Planning Solutions for the Business Owner	\$175
Fiduciary Income Tax	\$175
Fundamentals of Alternate Investment Products	\$175
Fundamentals of Life Insurance	\$175
Generation-Skipping Transfer Tax	\$175
Gift Taxation	\$175
How Trusts are Taxed	\$175
Income Tax Planning	\$175
Introduction to Estate Planning	\$335
Introduction to Investment Management	\$335
Introduction to Planning for Retirement Assets	\$175
Introduction to Trust Administration	\$335
Investment Policy	\$175
Investment Products	\$175
Managing Life Insurance Policies	\$175
Minimizing Fiduciary Risk & Litigation	\$175
Planning for Estate Tax	\$175
Prudent Portfolio Management	\$175
Special Needs Trusts	\$175
Stock Selection & Analysis	\$175
Types of Insurance	\$175
Understanding Transfer Tax	\$175

Course Title	Fee
ABA Online Certificates - Start Anytime!	
Bank Service Provider Certificate	\$355
Bank Teller Certificate	\$595
Branch Manager Certificate	\$995
Certificate in BSA & AML Compliance	\$1595
Certificate in Business & Commercial Lending	\$600
Certificate in Deposit Compliance	\$1595
Certificate in Fraud Prevention	\$795
Certificate in Lending Compliance	\$2195
Certificate in Operational Risk Management	\$1595
Certificate in Trust: Foundational	\$1495
Certificate in Trust: Intermediate	\$2295
Certificate in Trust: Advanced	\$2295
Customer Service Representative Certificate	\$595
Health Savings Account Expert Certificate	\$795
Personal Banker Certificate	\$595
Residential Mortgage Lender Certificate	\$775
Small Business Banker Certificate	\$595
Supervisor Certificate	\$595
Team Leader Certificate	\$595
Universal Banker Certificate	\$595

ABA certificate programs build the skills necessary for career advancement. Through a prescribed course of study, certificates provide practical, tailored knowledge specific to a job role in the bank. Programs are continually reevaluated and refined to meet current needs and changes in the industry. Students have 12 months to complete the certificate. To license a certificate for multiple learners, please contact the CFT office.

Visit our website for course descriptions.

HOW TO REACH US:

CFT-NCS

5215 N. Ironwood Rd.
Suite 202
Glendale, WI 53217

PHONE 414.332.6468
FAX 414.332.6478
EMAIL info@cftncs.org



WWW.CFTNCS.ORG

Instructor-Led Courses

2017-2018 Start Dates

Weeks Credits Fee ACE

Analyzing Bank Performance ABA	2017: 9/11	2018: 1/29	7	2	\$875	Yes
Analyzing Financial Statements ABA	2017: 10/2	2018: 2/12, 7/30	16	3	\$550	Yes
Basic Administrative Duties of a Trustee ABA	2017: 8/7, 11/13	2018: 4/16, 8/6	5	1	\$300	
Business Communication	2017: 9/18, 11/6	2018: 1/8, 3/12, 5/14, 7/16	10	3	\$575	Yes
Business Math	2017: 9/25, 11/6, 12/11	2018: 1/8, 2/5, 3/12, 4/23, 6/4, 7/9, 8/20	10	3	\$575	Yes
Commercial Lending ABA	2017: 8/7, 10/23	2018: 2/5	12	3	\$550	Yes
Consumer Lending ABA	2017: 11/6	2018: 1/8, 4/9, 7/9	16	3	\$500	Yes
Customer Service Excellence	2017: 10/9, 11/27	2018: 1/15, 3/5, 4/23, 6/18, 8/20	8	2	\$525	
Deposit Accounts & Services	2017: 10/2, 11/20	2018: 2/12, 4/30, 7/16	8	2	\$525	
Economics	2017: 9/18, 12/4	2018: 2/5, 3/12, 5/7, 7/9	10	3	\$575	Yes
Financial Accounting	2017: 11/13	2018: 1/15, 3/19, 6/4, 8/13	10	3	\$575	Yes
(The) Future of Business	2017: 9/4, 12/4	2018: 3/5, 6/4	10	3	\$575	Yes
Fundamentals of Mortgage Lending ABA	2017: 12/11	2018: 4/9	6	1	\$300	
General Accounting ABA	2017: 11/13	2018: 3/19, 7/23	16	3	\$600	Yes
Human Relations	2017: 9/18, 10/30	2018: 1/8, 2/26, 4/30, 7/9	10	3	\$575	Yes
Human Resource Management	2017: 9/4, 11/27	2018: 2/12, 4/9, 7/9	10	3	\$575	Yes
Intro to Agricultural Lending ABA	2017: 10/2	2018: 2/26, 7/16	8	1	\$475	
Intro to Trust Products & Services ABA	2017: 9/25	2018: 2/26, 6/18	5	1	\$300	
IRA Online Institute	2017: 9/5	2018: 2/26, 9/4	12	1	\$1595	
Law & Banking: Applications	2017: 9/11, 10/9, 11/27	2018: 1/8, 3/5, 4/23, 7/9	10	3	\$575	Yes
Law & Banking: Principles	2017: 9/4, 11/13	2018: 1/29, 3/12, 5/7, 7/16	10	3	\$575	Yes
Leading Your People to Success	2017: 9/4, 12/11	2018: 3/12, 6/11	8	1	\$475	
Legal Foundations in Banking ABA	2017: 9/11	2018: 3/26, 7/16	10	2	\$550	
Management	2017: 10/2	2018: 1/15, 4/2, 7/9	10	3	\$575	Yes
Managing Funding, Liquidity & Capital	2017: N/A	2018: 1/29, 6/11	6	1	\$875	Yes
Managing Interest Rate Risk	2017: 11/6	2018: 4/9	8	1	\$875	Yes
Managing the Bank's Investment Portfolio	2017: N/A	2018: 3/26, 8/6	5	1	\$875	Yes
Marketing	2017: 9/4, 10/2,	2018: 2/5, 4/16, 5/21, 7/16	16	3	\$500	Yes
Money & Banking ABA	2017: 11/6	2018: 2/5, 7/9	16	3	\$500	Yes
Organizational Behavior	2017: 10/23	2018: 1/29, 4/16, 7/23	10	3	\$575	Yes
Principles of Banking	2017: 9/5, 9/18, 10/2, 10/23, 11/6, 11/20, 12/4	2018: 1/8, 1/22, 2/5, 2/19, 3/5, 3/19, 4/2, 4/16, 5/7, 5/21, 6/18, 7/23, 8/20	10	3	\$575	Yes
Real Estate Appraisal	2017: 9/4, 12/4	2018: 3/5, 6/11	10	3	\$575	Yes
Real Estate Finance	2017: 10/9	2018: 1/22, 4/16, 7/23	10	3	\$575	Yes
Real Estate Law	2017: 10/23	2018: 2/12, 6/18	10	3	\$575	Yes
Residential Mortgage Lending	2017: 9/11, 10/30, 12/11	2018: 1/8, 2/26, 4/9, 6/4, 7/9	10	3	\$575	Yes
Review Course for CRCM Exam	2017: 8/14, 11/13	2018: 3/5, 8/13	10	1	\$900	
Review Course for CTFA Exam	2017: 10/30	2018: 2/5, 8/6	12	0	\$900	
Selling Fundamentals	2017: 9/18, 11/13	2018: 1/15, 3/19, 5/14, 7/23	10	3	\$575	
Statistics	2017: 10/16	2018: 1/22, 4/23, 8/6	10	3	\$575	
Supervision	2017: 9/18, 11/13	2018: 1/8, 2/5, 4/23, 6/4, 7/16	10	3	\$575	Yes
Supervisor Certificate ABA	2017: N/A	2018: 1/8	16	3.25	\$750	
Teller Operations	2017: 10/23	2018: 1/8, 3/12, 6/4, 7/23	8	2	\$525	

Instructor-Led Course Features

Peer interaction
Experienced online instructors
Convenient weekly schedule

Course Benefits

Maximizes your learning experience!
Provide feedback on assignments and industry context!
No need to be online at a specific date or time!

***ACE Credits:** College transfer recommendation status by the American Council on Education. Contact the CFT office for more information.

Withdrawal Policy: A refund is provided for written cancellations received by CFT ten (10) or more business days before the start of each instructor-led online course.

WWW.CFTNCS.ORG

1 COMPLETE FORM WITH APPROPRIATE SIGNATURES FOR BILLING

2 FAX TO : 414-332-6478 OR
MAIL TO: 5215 N. Ironwood Rd., Ste 202;
Glendale, WI 53217

3 REGISTER ONLINE
www.cftncs.org

PARTICIPANT INFORMATION

Name		Title	
Organization Name		Phone	
Organization Address		City	State Zip
Email (required)		Supervisor Signature	

BILLING INFORMATION

<input type="checkbox"/> Invoice Bank Attn To: <input type="checkbox"/> A Check Is Enclosed	Credit Card: <input type="checkbox"/> VISA <input type="checkbox"/> MasterCard	Name On Card			
		Address of Cardholder			
		City, State, Zip			
		Credit Card #			
		Exp Date		GSC # for Security	
		Cardholder Signature			

By submitting this registration I acknowledge that I have read and understand the withdrawal policies and hereby grant permission to provide information on my course grade to the CFT representative of my organization.

Course Title	Course Format	Fee
	<input type="checkbox"/> Independent Study <input type="checkbox"/> Self-Paced Online <input type="checkbox"/> Instructor-Led Online: Start Date _____	
	<input type="checkbox"/> Independent Study <input type="checkbox"/> Self-Paced Online <input type="checkbox"/> Instructor-Led Online: Start Date _____	
	<input type="checkbox"/> Independent Study <input type="checkbox"/> Self-Paced Online <input type="checkbox"/> Instructor-Led Online: Start Date _____	

*Processing Fee	\$15.00/each
TOTAL	

* Processing fee applies to online and independent study courses. This fee is nonrefundable.

HOW TO REACH US:

CFT-NCS
5215 N. Ironwood Rd.
Suite 202
Glendale, WI 53217 | **PHONE** 414.332.6468 **FAX** 414.332.6478 **EMAIL** info@cftncs.org