



Upstate NY

CERTIFICATE INFORMATION

The Center for Financial Training currently offers ten nationally-recognized Certificates, with concentrations in key areas of the financial services industry. The courses required for each of these Certificates are industry-related and provide practical information useful in the workplace.

Effective June 1, 2013, the following Certificate programs are available through CFT Upstate New York:

Intro Financial Services
Intro Accounting
Credit Analysis
Intro Sales & Service
Intro Human Resource

Intro Financial Services Operations
Intro Lending
Professional Teller
Intro Marketing
Intro Supervision

- **On-line Courses** - Continuous "Start Dates" Make Taking a Class More Convenient Than Ever!
- **Guided Self-Study Courses** - Work at Your Own Pace - You Decide Where and When to Complete the Course Work!
- **"Traditional" Live Evening Classes** - Spring, Summer, and Fall Semesters Provide You With Options to Continue Your Education!

Transfer Your College Credits to a College or University



recommendation.

Many CFT Courses are eligible for college credit transfer

Transferring Your College Credits to CFT

The Center for Financial Training accepts transfer college credits from most Colleges and Universities.

If you have any questions, Please contact the CFT Upstate NY office @ 315-233-7242 or e-mail us @ info@cftunyc.com

PLEASE NOTE: In order to keep pace with the ever-changing financial services landscape, it is necessary for CFT to revise the course requirements of certain certificates from time to time. If you have already begun the process of completing the requirements for a specific CFT Certificate, you can do so under the previous guidelines.



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CERTIFICATE REQUIREMENTS

Intro Financial Services Certificate

Principles of Banking
Law & Banking Principles
Business Math
Economics
Customer Service (Min ½ cr)

Intro Accounting Certificate

Principles of Banking
Business Math
Accounting
Economics
Communication Skills (Min ½ cr)

Credit Analysis Certificate

Principles of Banking
Accounting
Analyzing Financial Statements
Economics
Commercial Lending
(Plus one of the following):
Money & Banking
Real Estate Law

Intro Sales & Service Certificate

Principles of Banking
Sales Training (Min 3 cr)
Customer Service (Min 3 cr)
Marketing
Communication Skills (Min 2 cr)
Deposit Accounts & Services (Min ½ cr)

Intro Financial Services Operations Cert.

Principles of Banking
Law & Banking Applications
Business Math
Deposit Accounts & Services (Min ½ cr)
Communication Skills (Min ½ cr)

Intro Lending Certificate

Principles of Banking
Marketing
Accounting
Economics
Analyzing Financial Statements
(Plus one of the following):
Consumer Lending or Commercial Lending

Professional Teller Certificate

Principles of Banking
Business Math
Communication Skills (Min ½ cr)
Customer Service (Min ½ cr)
Marketing
Sales Training (Min ½ cr)
Teller Training (Min ½ cr)
Deposit Accounts & Services (Min ½ cr)

Intro Marketing Certificate

Principles of Banking
Marketing
Communication Skills (Min ½ cr)
Intro E-Commerce
Sales Training (Min ½ cr)
Ethics (Min ¼ cr)



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CERTIFICATE REQUIREMENTS

Continued...

Intro Human Resource Certificate

Principles of Banking

Human Relations

Human Resource Management

Communication Skills (Min ½ cr)

Ethical Issues (Min ¼ cr)

*(Plus **one** of the following):*

Understanding Organizational Behavior

Employment & labor Law

Intro Supervision Certificate

Principles of Banking

Supervision

Communication Skills (Min ½ cr)

Customer Service (Min ½ cr)

Human Relations

Managing Performance & Productivity (Min ½ cr)

Ethical Issues (Min ¼ cr)

*(Plus **two** of the following):*

Leadership Skills (Min ½ cr)

Motivating Your Staff (Min ¼ cr)

Interviewing & Hiring Techniques (Min ¼ cr)

Managing Change (Min ¼ cr)

CFT DIPLOMA REQUIREMENTS AND ELIGIBILITY

The following criteria must be met:

- ✓ All required courses must be completed with a passing grade.
- ✓ All courses must carry 3.00 credits unless otherwise noted.
- ✓ Up to 50% of the course credits needed for a specific Certificate may be transferred from a college or university. (CFT will also consider awarding credit for other training programs (including internal training) on a case-by-case basis.)