



Upstate NY

DIPLOMA INFORMATION

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

Effective June 1, 2013, the following Diploma programs are available through CFT Upstate NY:

General Financial Services
Financial Services Operations
Commercial Lending
Financial Services Management

Advanced Financial Services
Consumer Lending
Real Estate Lending
Financial Services Marketing

- **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@cftunyny.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 diplomas from time to time. If you have already begun the process of completing the requirements for a specific CFT Diploma, you can do so under the previous guidelines.



Upstate NY

DIPLOMA REQUIREMENTS

General Financial Services Diploma

Required Courses:

- ▶ Principles of Banking
- ▶ Business Math
- ▶ Economics
- ▶ Law & Banking: Principles
- ▶ Marketing
- ▶ Customer Service (Min ½ credit)
- ▶ Communication Skills (Min ½ credit)
- ▶ Accounting

Advanced Financial Services Diploma

Required Courses:

- ▶ Principles of Banking
- ▶ Business Math
- ▶ Economics
- ▶ Law & Banking: Principles
- ▶ Marketing
- ▶ Customer Service (Min ½ credit)
- ▶ Communication Skills (Min ½ credit)
- ▶ Accounting
- ▶ Analyzing Financial Statements
- ▶ Sales Training (Min 1 credit)
- ▶ Money & Banking

Financial Services Operations Diploma

Required Courses:

- ▶ Principles of Banking
- ▶ Business Math
- ▶ Economics
- ▶ Law & Banking: Applications
- ▶ Electronic Funds Transfer Act (Min ¼ credit)
- ▶ Customer Service (Min ½ credit)
- ▶ Communication Skills (Min ½ credit)
- ▶ Accounting
- ▶ Money & Banking
- ▶ Deposit Accounts & Services (Min ½ credit)
- ▶ IRA's (Min ¼ credit)

Financial Services Management Diploma

Required Courses:

- ▶ Principles of Banking
- ▶ Business Math
- ▶ Human Resource Management or Management
- ▶ Managing Performance & Productivity (Min ½ credit)
- ▶ Economics
- ▶ Marketing
- ▶ Communication Skills (Min ½ credit)
- ▶ Human Relations
- ▶ Understanding Organizational Behavior
- ▶ Accounting
- ▶ Sales Training (Min 1 credit)



Upstate NY

DIPLOMA REQUIREMENTS

Continued...

Financial Services Marketing Diploma

Required Courses:

- ▶ Principles of Banking
- ▶ Business Math
- ▶ Marketing
- ▶ Advertising
- ▶ Management
- ▶ Economics
- ▶ Law & Banking: Principles or Applications
- ▶ Communication Skills (Min ½ credit)
- ▶ Sales Training (Min 1 credit)
- ▶ Ethics (Min ¼ credit)
- ▶ Intro to E-Commerce

Consumer Lending Diploma

Required Courses:

- ▶ Principles of Banking
- ▶ Business Math
- ▶ Accounting
- ▶ Economics
- ▶ Law & Banking: Principles or Applications
- ▶ Analyzing Financial Statements
- ▶ Customer Service (Min ½ credit)
- ▶ Communication Skills (Min ½ credit)
- ▶ Consumer Lending
- ▶ Money & Banking
- ▶ Sales Training (Min 1 credit)

Commercial Lending Diploma

Required Courses:

- ▶ Principles of Banking
- ▶ Business Math
- ▶ Customer Service (Min ½ credit)
- ▶ Communication Skills (Min ½ credit)
- ▶ Economics
- ▶ Law & Banking: Principles or Applications
- ▶ Accounting
- ▶ Money & Banking
- ▶ Analyzing Financial Statements
- ▶ Sales Training (Min 1 credit)
- ▶ Commercial Lending
- ▶ Real Estate Finance

Real Estate Lending Diploma

Required Courses:

- ▶ Principles of Banking
- ▶ Business Math
- ▶ Customer Service (Min ½ credit)
- ▶ Communication Skills (Min ½ credit)
- ▶ Economics
- ▶ Law & Banking: Principles or Applications
- ▶ Accounting
- ▶ Money & Banking
- ▶ Analyzing Financial Statements
- ▶ Sales Training (Min 1 credit)
- ▶ Residential Mortgage Lending
- ▶ Real Estate Appraisal
- ▶ Real Estate Law

CFT DIPLOMA REQUIREMENTS AND ELIGIBILITY

The following criteria must be met:

- ✓ All required courses must be completed with a passing grade “D” or better. (minimum 2.00 GPA)
- ✓ All courses must carry 3.00 credits unless otherwise noted.
- ✓ Up to 50% of the course credits needed for a specific Diploma 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.)