

# Financial Counselor Training and Certification

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



REAL Solutions training provided  
with funding from the Michigan  
Credit Union Foundation



**Become a Certified Credit Union Financial Counselor.**  
Join the 240 Michigan credit union professionals that have  
attended this program in the last three years.

This unique financial counseling training program for credit union staff  
combines the lower cost and convenience of a self-study program with  
the group hands-on learning and networking of a live CUNA school.

**Register by May 1, 2013 to participate in the  
Guided Self-Study Training Program**

The 2013 program runs from May to October.  
Contact MCUL Financial Education Coordinator Beth Troost at  
(800)262-6285, ext.453 or at [Beth.Troost@mcul.org](mailto:Beth.Troost@mcul.org).

## CUNA's Financial Counseling Certification Program

FiCEP Part I Guided self-study

- Introduction to Financial Counseling
- Financial Counseling Essentials
- Special Issues in Financial Counseling
- Using Communication Skills During Financial Counseling

FiCEP Part II Guided self-study

- Taxes, Insurance, and Investments
- Controlling Living Expenses and Understanding Consumer Credit
- Matching Values to Money
- Retirement and Special Issues

## REAL Solutions and MCUL & Affiliates Group training, testing and support

- Bi-Weekly Group conference calls to help you stay on track and 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 with group communication to help you put your new skills into practice.

## Financial Counseling Guided Self-Study Training Program

Please complete the information below with signatures and return this registration form **by May 1, 2013**. For additional information about the training, contact MCUL Financial Education Coordinator, Beth Troost at [beth.troost@mcul.org](mailto:beth.troost@mcul.org) or by phone at (800)262-6285, ext. 453.

**Curriculum Modules:** **\$442** is the cost for the complete curriculum. CUNA will invoice your credit union for this amount after registration.

### FiCEP Part I

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 II

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:** Module books may be shared with an additional registrant at your credit union. One set of tests is free with each set of modules ordered. If sharing modules, CUNA charges an additional test fee of \$30 per module for additional participants which will total \$240 for all eight tests/modules.

**REAL Solutions Training Sessions:** Because funding for the REAL Solutions training is provided by the **Michigan Credit Union Foundation (MCUF)** there will be **no additional participation fee** to credit unions for the group sessions or webinars. Bi-weekly webinars and live group training sessions will be conducted by REAL Solutions, the signature program of the National Credit Union Foundation. Approximate schedule:

- Bi-Weekly webinars will be held from May to September: One orientation webinar and eight bi-weekly webinars; one for each module – webinars will be recorded.
- Two live group sessions will be held for training and testing. These will be one day sessions scheduled in early August for part one and in early October for part two with exact dates and locations to be announced.

The **Michigan Credit Union Foundation** is proud to support your credit union's participation in the 2013 REAL Solutions FiCEP Training. As part of your participation in this program, you will be asked to periodically report on the counseling activities you complete at your credit union once you become a Certified Credit Union Financial Counselor. This data will be used to show the impact credit union financial counselors are having on their membership and communities. By participating in this program, you agree that your credit union's name may be used in MCUL & Affiliates and MCUF publications and marketing.

Signature of Credit Union CEO: \_\_\_\_\_

Signature of Credit Union Participant: \_\_\_\_\_

Participant Name: \_\_\_\_\_ Title: \_\_\_\_\_

Credit Union: \_\_\_\_\_ CUID: \_\_\_\_\_

Shipping Address: \_\_\_\_\_

PH: \_\_\_\_\_ E-mail: \_\_\_\_\_

\_\_\_\_ 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@mcul.org](mailto:kathryn.hall@mcul.org) or fax to (517) 482-3762 by May 1, 2013.

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