



Financial Counselor Training and Certification

Help your members build a strong financial future

Training can be used for:

- Enhancing all member interactions
- One-on-one counseling
- Financial education
- Enhancing lending and collection activities



For all credit union staff:
Branch management
Member service
Lending/collections
Community educators

Michigan Credit Union Foundation Funding Makes Training Affordable!

- \$416 discounted curriculum fee.
- Free webinars and group training and testing sessions.
- Full scholarships available for small credit unions.

Become a CUNA Certified Credit Union Financial Counselor (CCUFC) and help members reach their financial goals!

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

Register by April 6 to participate in the 2018 Enhanced Self-Study Training Program

Contact Kathryn Hall to apply
(800)262-6285, ext.470 or at Kathryn.Hall@mcuf.org.

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.

- Proven financial counseling skills that 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.
- Differentiate your credit union by having certified financial counselors.
- Help members transform the way they deal with money through financial counseling.

Group Training, Testing, and Support

- Webinars help you stay on track and be able to ask questions as you study each module (May – Oct.).
- Two live group training sessions in Michigan for Part I (in July) and Part II (in October) provide hands-on training with experienced counselors, networking opportunities and proctored group testing (dates and locations TBD).
- Ongoing networking and support help you put your new skills into practice.





Financial Counseling Guided Self-Study Training Program Scholarship Application and Registration

Please complete the information below with signatures and return this registration form **by April 6, 2018**. For additional information please contact Kathryn Hall at Kathryn.Hall@mcu.org or by phone at (800)262-6285, ext. 470.

Cost of Curriculum Modules: \$416 is the discounted cost for the complete curriculum.

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 and Understanding Consumer Credit (Module 2)
- Matching Values to Money (Module 3)
- Retirement and Special Issues (Module 4)

Curriculum Sharing Option: While full registration is suggested for participants, each set of modules may be shared with one additional registrant at your credit union. One set of tests is free with each set of modules purchased. If sharing modules, CUNA charges a testing fee of \$100 for the additional participant.

The Michigan Credit Union Foundation covers the costs of the webinars and live training and testing sessions, \$375 per participant. Therefore, there will be **no additional participation fee** to credit unions for these program enhancements.

Participation in these training sessions is strongly recommended but not mandatory for certification.

- **Bi-Weekly webinars** from May to October: One orientation webinar and one webinar for each of the eight modules. Webinars will be recorded for access.
- **Two live group sessions** will be held for training and testing. These 6 hour sessions will be scheduled in July for part 1, and in October for part 2, with specific dates and locations to be announced.

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 MCFU funding and agree that your credit union’s name may be used in MCUL & Affiliates and MCFU publications and marketing.

Signature of Credit Union CEO: _____

Participant Name: _____ Title: _____

Credit Union: _____ CUID: _____

PH: _____ E-mail: _____

Small Credit Union Curriculum Scholarship: Check to apply for a scholarship. A limited number of full scholarships are available small credit unions (with assets of \$50M or less).

Sharing: 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@mcu.org by April 6, 2018.

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