

Learning Plans

Credit union-specific learning plans guide your career path

Choose one of these credit union positions that fits your educational needs:

- Accounting Clerk
- Branch Manager
- Collector
- Compliance Officer
- Loan Officer, Loan Processor, or VP Lending
- Marketing Manager
- Member Service Representative
- New Employee Orientation
- Teller, Head Teller, or Teller Manager

Start with the core competency courses which provide the base for your learning adventure. Continue your professional development with the specialized courses specific to each position. The completion of a learning plan ensures you have the skill set and knowledge to succeed. Be sure to check out the recognition options. Many courses offer certificates, designations, or college credit to document your educational experience.

CORE COMPETENCY COURSES

Course Title	Online	Print	Course Title	Online	Print
BANKRUPTCY			MARKETING		
<input type="checkbox"/> Bankruptcy and Court Proceedings		\$400	<input type="checkbox"/> Developing Retail Marketing		M28
OR			MEMBER SERVICES AND ACCOUNTS		
<input type="checkbox"/> Bankruptcy	A1006		<input type="checkbox"/> Member Relations	\$20	\$20
COMPLIANCE			<input type="checkbox"/> Money and Negotiable Instruments	\$100	\$100
<input type="checkbox"/> RegTraC Level 1, Module 2		22691	<input type="checkbox"/> Member Services	\$110	\$110
OR			<input type="checkbox"/> Opening New Accounts	\$800	\$800
<input type="checkbox"/> Bank Bribery Act	R102D		<input type="checkbox"/> Professional Member Service	A1005	SI308
<input type="checkbox"/> Bank Secrecy Act	R102A		SALES		
<input type="checkbox"/> NCUA Privacy Regulation	R102H		<input type="checkbox"/> Credit Union Sales	A1002	SI305
<input type="checkbox"/> OFAC - Office of Foreign Assets Control	R102B		<input type="checkbox"/> Cross-Selling	SI20	SI20
<input type="checkbox"/> RegTraC Level 1, Module 3		22692	<input type="checkbox"/> Improving and Maintaining Quality Service	\$500	\$500
OR			<input type="checkbox"/> Leading and Managing Credit Union Sales		M16
<input type="checkbox"/> Reg B - Equal Credit Opportunity Act	R103F		<input type="checkbox"/> Managing Financial Education Programs		M30
CREDIT UNION ORIENTATION			SECURITY		
<input type="checkbox"/> Introduction to Credit Unions	A1004	SI304	<input type="checkbox"/> Online Security		M36
HR STAFFING AND THE LAW			<input type="checkbox"/> Preventing Fraud	\$900	\$900
<input type="checkbox"/> Employment Law and Preventing Sexual Harassment	M13	M13	<input type="checkbox"/> Recognizing Emerging Fraudulent Practices	A1015	SI1317
<input type="checkbox"/> Workplace Diversity	M12	M12	<input type="checkbox"/> Robbery Prevention and Preparation	SI320	SI320
INTERPERSONAL SKILLS AND CAREER BUILDING			<input type="checkbox"/> Security	S30	S30
<input type="checkbox"/> Business Communication Skills	A1003	M37	<input type="checkbox"/> Security Administration		M24
<input type="checkbox"/> Communications and Telephone Skills	SI303	SI303	<input type="checkbox"/> Security Issues	\$910	\$910
<input type="checkbox"/> Develop a Career Plan	SI000	SI000	<input type="checkbox"/> Security Procedure Protocol	A1008	SI309
<input type="checkbox"/> Helping Members Understand and Solve Problems	SI110	SI110	TECHNOLOGY		
<input type="checkbox"/> Interpersonal Skills: Understanding Your Effect on Others	M15	M15	<input type="checkbox"/> Credit Union Technology	\$600	\$600
<input type="checkbox"/> Make Work Manageable	SI020	SI020	<input type="checkbox"/> Managing Technology		M20
<input type="checkbox"/> Write Effectively	SI010	SI010	<input type="checkbox"/> Serving Members with Technology	\$620	\$620
MANAGEMENT SKILLS AND MANAGING EMPLOYEE PERFORMANCE			<input type="checkbox"/> The Critical Role of Technology in Credit Unions	A1009	\$630
<input type="checkbox"/> Resolving Employee Conflict	A1016	M38	<input type="checkbox"/> Using Technology to Improve Member Service	SI120	SI120
OR					
<input type="checkbox"/> Managing Conflict	M14				

Editions and formats are updated frequently. Visit training.cuna.org for the most current information.



Credit Union National Association

Specialized courses for each credit union position

Add these courses along with the core competency courses to complete your learning plan.



LOAN OFFICER

Course Title	Online	Print	Course Title	Online	Print
ACCOUNTING, BUDGETING, AND FINANCE			FINANCIAL COUNSELING		
<input type="checkbox"/> Asset-Liability Management for Executives	M18	M18	<input type="checkbox"/> FiCEP Part I		27568K
<input type="checkbox"/> Reconciling Records	A1013	S1315	OR		
			<input type="checkbox"/> Financial Counseling Essentials		27565
BUSINESS MATH			<input type="checkbox"/> FiCEP Part II		27573K
<input type="checkbox"/> Business Math: Lending and Credit	A1000	S1306	OR		
COLLECTIONS			<input type="checkbox"/> Matching Lifestyle to Income		27570
<input type="checkbox"/> Applying Collection Practices	A1014	S1316	<input type="checkbox"/> Retirement Planning		27572
COMPLIANCE			LENDING AND LOAN PROCESSING		
<input type="checkbox"/> Reg TraC Level I, Module 3		22692	<input type="checkbox"/> Home Equity Lending		M22
OR			<input type="checkbox"/> Lending Products and Regulations	S210	S210
Fair Credit Reporting Act	R103D		<input type="checkbox"/> Loan Interviewing	S700	S700
NCUA Lending Regulations	R103E		<input type="checkbox"/> Loan Pricing		M23
Reg Z - Truth in Lending	R103H		<input type="checkbox"/> Loan Servicing	S720	S720
Servicemembers' Civil Relief Act	R103G		<input type="checkbox"/> Loan Underwriting	S710	S710
UCC Article 9	R103A		<input type="checkbox"/> Maintaining Loan Documents	A1012	S1314
			<input type="checkbox"/> Preparing Loan Documents	A1011	S1313
COMPLIANCE (Add this course for a business lending focus)			<input type="checkbox"/> Providing Loans to Small Businesses		M29
<input type="checkbox"/> Reg TraC Level I, Module 3		22692	<input type="checkbox"/> Servicing Mortgage Loans	A1010	S1312
OR			<input type="checkbox"/> The Lending Process	S200	S200
Business Lending Regulations	R103C		MEMBER SERVICES AND ACCOUNTS		
			<input type="checkbox"/> Financial Counseling for Members	S1301	S1301
COMPLIANCE (Add these courses for a mortgage lending focus)			<input type="checkbox"/> Investment Choices for Members	S820	S820
<input type="checkbox"/> Reg Trac Level I, Module 4		22693	SPANISH		
OR			<input type="checkbox"/> Credit Union Spanish: Applying the Basics	A1017	
Fair Housing Act	R104E		<input type="checkbox"/> Spanish for Tellers	A1007	
Flood Disaster Protection Act	R104A				
Homeowner's Protection Act	R104B				
RESPA - Real Estate Settlement Procedures Act	R104C				
Reg C - Home Mortgage Disclosure Act	R104D				
Secondary Mortgage Markets	R104F				

For more information or to order:

Visit: training.cuna.org and choose **Self-Study Certificate Programs**

Call: **800-356-9655, ext. 4072**

E-mail: elearning@cuna.coop