



Financial Counseling Certification Program (FiCEP) 2021

Program Overview

This is an enhanced and unique training program for credit union staff that combines the convenience of a self-study program with group hands-on learning.

The program begins in early June and includes biweekly webinars to help students stay on track with their studies.

A virtual group training and virtual proctored testing session will be held midway through the program and one week before testing.

Group Training and Support

- Access to the student FiCEP Portal, with webinars and study guides
- Live review session via Zoom
- Book and exam
- Virtual proctoring, using a video-ready device such as a laptop, computer, tablet, or smartphone.

Students will receive a formal welcome email and will be granted access to the student FiCEP Portal upon registration.

Important Dates

Registration closes: April 30

Program starts: June 7

Live review: Aug. 5 (virtual)

Testing dates: Oct. 6 and 7 (virtual)

Become a Certified Credit Union Financial Counselor (CCUFC)

Students learn the skills and knowledge necessary to assist and empower members to improve their financial well-being. Program benefits include:

- ✓ Acquiring skills to help those experiencing financial difficulties.
- ✓ Reducing delinquencies and charge-offs.
- ✓ Growing product and service revenue.
- ✓ Demonstrating the credit union difference.
- ✓ Attracting new members.

One book and one exam cover the following topics:

- Introduction to Financial Counseling
- Financial Counseling Essentials
- Special Issues in Financial Counseling
- Using Communication Skills During Financial Counseling
- Taxes, Insurance, and Investments
- Controlling Living Expenses
- Money, Attitudes, and Behaviors
- Retirement and Personal Financial Preparedness

Half Price: \$300 (Original Cost: \$600)

As the pandemic continues, the Cornerstone Foundation understands the increasing need for members and consumers to seek financial counseling. To meet these needs, the Foundation is offering the program at **half** the cost for credit union staff. New this year, the Credit Union National Association introduced an updated version of the program, which includes just **one** instruction book (formerly eight) and **one** overall test (formerly two).

Registration

Registration is open. Sign up at: www.cornerstoneleague.coop/ficepreg. The **deadline** to register is **April 30**.

Questions: Contact Financial Capability Director Contact Marina Garcia at mgarcia@cornerstonefoundation.coop or 972-322-9312.