



Financial Counseling Certification Program (FiCEP) 2024

Program Overview

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

Group Training and Support

- Access to the student FiCEP Portal inclusive of engaging and interactive webinars and study guides
- Live Exam Prep Session via Zoom
- Book and Exam
- Virtual Proctoring (requires a video-ready device such as: laptop, computer, tablet, smartphone)

Students will receive a formal Welcome Email & access to their student FiCEP Portal upon registration

Important Dates:

Cohort 1 option:

Registration Opens: December 4, 2023

Registration Closes: January 19, 2024

Program start date: March 18

Zoom Review & Testing: Week of June 3

Cohort 2 option:

Registration Opens: April 8

Registration Closes: June 7

Program start date: August 5

Zoom Review & Testing: Week of Oct 21

Become A Certified Credit Union Financial Counselor (CCUFC)

Students learn skills and knowledge necessary to assist and empower members to improve their financial well-being.

- ✓ Acquire skills to help those experiencing financial difficulties
- ✓ Reduce delinquencies & charge-offs
- ✓ Grow product and service revenue
- ✓ Demonstrate the credit union difference
- ✓ Attract new members

ONE Book and ONE Exam covering 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

Educational Investment

- \$750 per person - 6th edition textbook
- If 2 students share a book, the second student pays \$350. Sharing is 2 users to 1 purchase ratio only.
- \$1,500 per student for non-member CUNA credit unions
- \$250 per student for credit unions with the CUNA Bundle

Registration

Register via www.cornerstonefoundation.coop.

Questions: Contact Emily Moreno, Program Director,
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