

CFT FINANCIAL SERVICES *ADVANCED* DIPLOMA WORKSHEET

Date _____

Name _____ Employer _____

The CFT Advanced Financial Services Diploma provides students with the specific competencies and in depth knowledge necessary to establish the foundation for a successful financial services career.

CERTIFICATE REQUIREMENTS AND ELIGIBILITY

- Required courses, seminars and electives have been successfully completed.
- "C" average or better (minimum 2.00 GPA).
- Required courses must be completed with a passing grade (D or better).
- Up to half of the course credits needed for this certificate may be transferred from a college or university or by local credit review.
- In order to keep pace with the ever-changing financial services landscape, it is necessary for CFT to revise the course requirements of certain diplomas and certificates from time to time. If you have already begun the process of completing the requirements for a specific CFT diploma or certificate, you can continue to do so under the previous guidelines.

REQUIRED PROGRAMS

You must complete the following courses:

#Credits	Grade	
_____	_____	Principles of Banking or Banking and Financial Systems
_____	_____	Law and Banking: Applications or Law and Banking: Principles
_____	_____	Economics
_____	_____	Marketing
_____	_____	Business Math
_____	_____	Customer Service (2 Credit Minimum)
_____	_____	Accounting
_____	_____	Money and Banking
_____	_____	Analyzing Financial Statements
_____	_____	Communication Skills - Written or Verbal (1 Credit Minimum)
_____	_____	Selling Skills (1 Credit Minimum)

Plus two of the following:

_____	_____	Consumer Lending
_____	_____	Commercial Lending
_____	_____	Introduction to Mortgage Lending/Residential Mortgage Lending

ELECTIVES

# Credits	Grade	Course Title
_____	_____	_____
_____	_____	_____

_____ **TOTAL CREDITS (Total Credits needed 34 or more)**