

CFT INTRODUCTION TO FINANCIAL SERVICES CERTIFICATE WORKSHEET

Date _____

Name _____ Employer _____

The CFT Introduction to Financial Services certificate provides participants with the knowledge and communications skills needed to deliver financial services effectively and be successful in a 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. Required courses are listed in order of recommended sequence.

#Credits	Grade	
_____	_____	Principles of Banking and Financial Systems
_____	_____	Law & Banking: Applications or Law & Banking: Principles
_____	_____	Economics
_____	_____	Marketing
_____	_____	Business Math
_____	_____	Customer Service (2 Credit Minimum)

ELECTIVES

#Credits	Grade	Course Title
_____	_____	_____
_____	_____	_____
_____	_____	_____

_____ **TOTAL CREDITS (Total Credits needed 17 or more)**