

Name

Date

AIB Bank Financial Management Diploma

This diploma is designed for individuals who are involved in the financial management of their bank, including junior officers up through CEOs, CFOs and other senior officers making key decisions that affect bank profitability. The courses required for this diploma cover the analysis of bank performance, the measurement and management of interest rate risk, and the management of funding, liquidity and capital. The required courses all use the same textbook that provides participants with the basic concepts in each of the areas. Each of the courses includes exercises in which participants apply these concepts to their own institution. Candidates should have an understanding of accounting and financial markets before beginning the required courses. Experience in the use of electronic spreadsheets is helpful but not required.

Required Courses

Students must successfully complete the following courses. No substitutions or previous college credit will be accepted for this diploma.

Date	Grade	Course
_____	_____	AIB Analyzing Bank Performance
_____	_____	AIB Ethical Issues for Bankers
_____	_____	AIB Managing the Bank's Investment Portfolio
_____	_____	AIB Managing Funding, Liquidity and Capital
_____	_____	AIB Managing Interest Rate Risk

AIB Diploma Code: 46

When you have completed the required courses, send this completed form to your Local ABA Training Provider: West Virginia Bankers Association, 120 Washington St. E., Charleston WV 25301 or fax to 304-343-9749. If you have college courses for review for transfer to the AIB program, please ask the college to send us an official transcript. For questions regarding AIB classes, email datkinson@wvbankers.org or call us at 800-343-8038 or 304-343-8838.

Name

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AIB Bank Marketing Diploma

In today's competitive environment, marketing is a critical function of banks. Bank marketing is a far-reaching discipline that includes advertising, business development, public relations, market research, product development, and service quality. Bank marketing is also responsible for developing current markets and identifying new ones. Marketing planning and strategy integrate the various bank marketing functions. At the core of the AIB Bank Marketing Diploma is in-depth course work on marketing financial services, along with related topics such as event-based selling and successful sales campaigns. Courses on financial and business planning and on project management provide essential business skills that experienced bank marketers have identified as critical to the function. Supporting the marketing-specific core are courses in banking fundamentals, economics and business ethics.

The AIB Bank Marketing Diploma is an ideal program for bank marketers who are relatively new to the profession. It also represents an excellent opportunity for bankers outside the marketing area who desire a solid background in marketing to support their current responsibilities (e.g., branch managers).

Required Courses

Students must successfully complete the following courses. The Economics requirement may be met by transfer credit from an accredited college or university for a minimum of 3 credits.

Date	Grade	Course
_____	_____	AIB Principles of Banking
_____	_____	AIB Dealing Effectively with Co-workers
_____	_____	AIB Economics for Bankers
_____	_____	AIB Ethical Issues for Bankers
_____	_____	AIB Event-Based Selling
_____	_____	AIB Financial and Business Planning for Bank Marketers
_____	_____	AIB Managing Time at Work
_____	_____	AIB Marketing Financial Services
_____	_____	AIB Project Management Fundamentals I and II
_____	_____	AIB Successful Sales Campaigns

The AIB Bank Marketing Diploma meets the pre-certification education requirements for the Certified Financial Marketing Professional (CFMP) designation through the Institute of Certified Bankers (ICB).

When you have completed the required courses, send this completed form to your Local ABA Training Provider: West Virginia Bankers Association, 120 Washington St. E., Charleston WV 25301 or fax to 304-343-9749. If you have college courses for review for transfer to the AIB program, please ask the college to send us an official transcript. For questions regarding AIB classes, email datkinson@wvbankers.org or call us at 800-343-8038 or 304-343-8838.

Name _____

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AIB Bank Operations Diploma

Bank operations are the infrastructure of the organization. Individuals who work in operations across the bank are responsible for ensuring that the daily workflow is smooth and efficient. With views toward operational efficiency and customer expectations, bank operations personnel continually review current methods and procedures and often recommend process improvements and innovations. In the course of their duties, operations personnel interact with staff throughout the bank, from data processing to customer contact areas. Supervisors and managers in operations are responsible for seeing that their areas are staffed adequately with well-trained personnel, who understand banking processes, process improvement methods and project management.

This curriculum provides a solid grounding in banking fundamentals, which is essential to new or aspiring operations managers or supervisors. Critical knowledge areas such as accounting, legal and regulatory aspects of banking, general bank operations, payment systems, and supervision are central to the program. The diploma is an ideal foundation for bankers new to the operations area.

Required Courses

You must complete the following courses. Those titles with an asterisk (*) may be met by transfer credit from an accredited college or university. Each course transferred must be taken for a minimum of 3 credits.

Date	Grade	Course
_____	_____	AIB Principles of Banking
_____	_____	AIB General Accounting* or AIB Financial Accounting*
_____	_____	AIB Law and Banking: Applications or AIB Law and Banking: Principles
_____	_____	AIB Money and Banking
_____	_____	AIB Supervision or AIB Supervisor Certificate

Electives

You must complete 4 elective credits. At least 2 credits must be AIB courses; the other 2 may be from college courses that are equivalent to courses in the AIB curriculum.

Date	# Credits	Grade	Course
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Our General Accounting course is developed for students having no previous accounting education or work experience. It does, however, use a college textbook.

When you have completed the required courses, send this completed form to your Local ABA Training Provider: West Virginia Bankers Association, 120 Washington St. E., Charleston WV 25301 or fax to 304-343-9749. If you have college courses for review for transfer to the AIB program, please ask the college to send us an official transcript. For questions regarding AIB classes, email datkinson@wvbankers.org or call us at 800-343-8038 or 304-343-8838.

Name

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AIB Banking and Finance Diploma

To receive an AIB Banking and Finance Diploma, you must successfully complete 30 credits. Of the 30 credits, **at least** 15 credits must be completed in ABA/AIB courses (including any credit-earning online courses), using ABA/AIB materials and meeting the minimum educational requirements set by the American Bankers Association. The remaining 15 credits may be from coursework that directly relates only to the study of finance and financial services at an accredited college or university.

Required Courses

You must complete the following courses:

Date	Grade	Course
_____	_____	AIB Principles of Banking
_____	_____	AIB Analyzing Financial Statements*
_____	_____	AIB Economics for Bankers*
_____	_____	AIB Financial Accounting*
_____	_____	AIB Law and Banking: Applications or Law and Banking: Principles

and one of the following:

_____	_____	AIB Commercial Lending
_____	_____	AIB Consumer Lending
_____	_____	AIB Introduction to Mortgage Lending

Plus one other ABA/AIB course of your choosing

Date	# Credits	Grade	Course
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

* These three required courses may be replaced by equivalent courses offered by an accredited institution of higher education, subject to ABA approval. These equivalents must be at least 3 credits each. (However, in such cases, a total of 15 credits must still be fulfilled through ABA/AIB coursework using ABA/AIB materials.)

When you have completed the required courses, send this completed form to your Local ABA Training Provider: West Virginia Bankers Association, 120 Washington St. E., Charleston WV 25301 or fax to 304-343-9749. If you have college courses for review for transfer to the AIB program, please ask the college to send us an official transcript. For questions regarding AIB classes, email datkinson@wvbankers.org or call us at 800-343-8038 or 304-343-8838.

Name

Date

AIB Commercial Lending Diploma

Commercial lending is central to the banking business. Commercial lenders respond to the needs of current or potential bank customers who are seeking loans to support their business enterprises. Lenders make and service loans using formalized processes that include: securing pertinent information on the business and the need for the loan, analyzing related financial data, conducting credit checks, preparing necessary documents and agreements, calling on customers, and resolving actual or potential credit issues.

This curriculum is comprehensive in that it addresses broad banking understanding, financial accounting, commercial lending and credit analysis, product knowledge — both credit and deposit products for small businesses — legal and regulatory issues, and a number of other topics that support the overall business relationship.

The program is well suited to management trainees, new commercial lenders, and those individuals in lending support positions.

Required Courses

You must complete the following courses. Those titles with an asterisk (*) may be met by transfer credit from an accredited college or university. Each course transferred must be taken for a minimum of 3 credits.

Date	Grade	Course
_____	_____	AIB Principles of Banking
_____	_____	AIB Analyzing Financial Statements*
_____	_____	AIB Commercial Lending
_____	_____	AIB Credit Products for Small Business Customers
_____	_____	AIB Dealing Effectively with Co-workers
_____	_____	AIB Deposit Products for Small Business
_____	_____	AIB Ethical Issues for Bankers
_____	_____	AIB Financial Accounting*
_____	_____	AIB Law and Banking: Principles
_____	_____	AIB Managing Time at Work
_____	_____	AIB Presentation Skills
_____	_____	AIB Relationship Selling to Small Business Customers
_____	_____	AIB Servicing & Growing Small Business Relationships

The AIB Commercial Lending Diploma meets the pre-certification education requirements for the Certified Lender Business Banking (CLBB) designation through the Institute of Certified Bankers (ICB).

When you have completed the required courses, send this completed form to your Local ABA Training Provider: West Virginia Bankers Association, 120 Washington St. E., Charleston WV 25301 or fax to 304-343-9749. If you have college courses for review for transfer to the AIB program, please ask the college to send us an official transcript. For questions regarding AIB classes, email datkinson@wvbankers.org or call us at 800-343-8038 or 304-343-8838.

Name

Date

AIB Consumer Lending Diploma

Consumer lenders provide service to customers and prospective customers through various credit products and services. Consumer lenders need to understand the consumer lending process from developing and taking loan applications to collection and recovery.

Consumer lenders participate in the bank's sales and development activities. Because meeting sales objectives is a critical responsibility of the position, consumer lenders often identify and follow through with cross-selling opportunities. To be successful, consumer lenders must stay current on all trends, issues and procedures affecting the consumer lending function, especially changing rules and regulations. They also need to develop solid relationship management skills.

The AIB Consumer Lending Diploma reflects a balanced treatment of the knowledge and skill requirements of a typical consumer lender. Complementing consumer-lending coursework are topics in general banking, accounting and credit analysis, and legal and regulatory compliance. Approaches to relationship management and relationship selling are also addressed. In addition, emphasis is placed on practical business skills, such as time management, effective presentations and writing bank correspondence.

Required Courses

You must complete the following courses. Those titles with an asterisk (*) may be met by transfer credit from an accredited college or university. Each course transferred must be taken for a minimum of 3 credits.

Date	Grade	Course
_____	_____	AIB Principles of Banking
_____	_____	AIB Analyzing Financial Statements*
_____	_____	AIB Building and Retaining Customer Relationships
_____	_____	AIB Consumer Lending
_____	_____	AIB Effective Referrals
_____	_____	AIB Ethical Issues for Bankers
_____	_____	AIB General Accounting * or AIB Financial Accounting*
_____	_____	AIB Introduction to Relationship Selling
_____	_____	AIB Law and Banking: Applications or AIB Law and Banking: Principles
_____	_____	AIB Managing Time at Work
_____	_____	AIB Presentation Skills
_____	_____	AIB Writing Bank Correspondence

Our General Accounting course is developed for students having no previous accounting education or work experience. It does, however, use a college textbook.

When you have completed the required courses, send this completed form to your Local ABA Training Provider: West Virginia Bankers Association, 120 Washington St. E., Charleston WV 25301 or fax to 304-343-9749. If you have college courses for review for transfer to the AIB program, please ask the college to send us an official transcript. For questions regarding AIB classes, email datkinson@wvbankers.org or call us at 800-343-8038 or 304-343-8838.

Name

Date

AIB General Banking Diploma

ABA's research, conducted with bankers representing a cross-section of professional specializations, suggests that a solid grounding in banking fundamentals is an indispensable element of professional success. In part, this explains why the AIB General Banking Diploma has been the most popular and widely recognized AIB diploma for individuals new to the banking industry.

The curriculum for this diploma centers on banking essentials, such as the role of banking in the U.S. economy and the purpose of specific banking functions. Courses in accounting and economics provide the foundation for an understanding of banking. Legal and regulatory issues and compliance matters, as well as marketing fundamentals are addressed through specific course work. In addition, training in identifying and resolving ethical issues, which may surface during the course of day-to-day business, is part of the overall program.

Required Courses

You must complete the following courses. Those titles with an asterisk (*) may be met by transfer credit from an accredited college or university. Each course transferred must be taken for a minimum of 3 credits.

Date	Grade	Course
_____	_____	AIB Principles of Banking
_____	_____	AIB Economics for Bankers*
_____	_____	AIB Ethical Issues for Bankers
_____	_____	AIB General Accounting* or AIB Financial Accounting*
_____	_____	AIB Law and Banking: Principles or AIB Law and Banking: Applications
_____	_____	AIB Marketing Financial Services

Electives

You must complete 6 elective credits. At least 3 credits must be AIB courses; the other 3 may be from college courses that are equivalent to courses in the AIB curriculum.

Date	# Credits	Grade	Course
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Our General Accounting course is developed for students having no previous accounting education or work experience. It does, however, use a college textbook.

When you have completed the required courses, send this completed form to your Local ABA Training Provider: West Virginia Bankers Association, 120 Washington St. E., Charleston WV 25301 or fax to 304-343-9749. If you have college courses for review for transfer to the AIB program, please ask the college to send us an official transcript. For questions regarding AIB classes, email datkinson@wvbankers.org or call us at 800-343-8038 or 304-343-8838.

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AIB Mortgage Lending Diploma

In meeting the needs of their communities, mortgage lending is an important function of banks. Depending on the institution, mortgage lenders may be involved with many different aspects of the mortgage lending and servicing function. To be successful, mortgage lenders must have a solid understanding of the mortgage lending process, including the methods and procedures used to make loans to individuals for the purchase of a residence, as well as loans to builders and real estate developers.

Mortgage lending personnel provide service to customers and prospective customers, and often participate in business development activities. In addition to developing an understanding of the mortgage lending process, credit analysis, financing, real estate law, and the secondary market, mortgage lenders must manage business relationships and keep current with changes in related government regulations.

The AIB Mortgage Lending Diploma requires a good understanding of banking, accounting, credit analysis, and legal principles. The courses in the diploma program provide a solid foundation for learning the mortgage lending business, including aspects of underwriting, processing and servicing, and approaches to profiling mortgage prospects. The diploma is well suited to aspiring mortgage lenders and to those individuals relatively new to the mortgage area of the bank, including mortgage loan clerks, loan processors and closers.

Required Courses

You must complete the following courses. Those titles with an asterisk (*) may be met by transfer credit from an accredited college or university. Each course transferred must be taken for a minimum of 3 credits.

Date	Grade	Course
_____	_____	AIB Principles of Banking
_____	_____	AIB Analyzing Financial Statements*
_____	_____	AIB Effective Referrals
_____	_____	AIB Ethical Issues for Bankers
_____	_____	AIB Financial Accounting*
_____	_____	AIB Introduction to Mortgage Lending
_____	_____	AIB Introduction to Relationship Selling
_____	_____	AIB Law and Banking: Principles
_____	_____	AIB Managing Time at Work
_____	_____	AIB Personal Tax Return Analysis
_____	_____	AIB Presentation Skills
_____	_____	AIB Profiling Mortgage Prospects
_____	_____	AIB Writing Bank Correspondence

When you have completed the required courses, send this completed form to your Local ABA Training Provider: West Virginia Bankers Association, 120 Washington St. E., Charleston WV 25301 or fax to 304-343-9749. If you have college courses for review for transfer to the AIB program, please ask the college to send us an official transcript. For questions regarding AIB classes, email datkinson@wvbankers.org or call us at 800-343-8038 or 304-343-8838.

Name

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AIB Personal Banking Diploma

Personal Bankers, sometimes referred to as Financial Services Representatives or Financial Services Associates, are responsible for providing full-service banking to customers by providing appropriate credit, deposit and other banking services that meet customer needs and expectations. Personal Bankers often drive the sales and service function in the bank office or branch. They call on potential and current customers to develop new business relationships and to support customer retention strategies. They also sell and cross-sell a variety retail and trust services. Successful Personal Bankers have acquired broad product knowledge, including specific understanding of the different types of deposit and loan products. Customer service skills are critical to the Personal Banker position along with sales skills that focus on profiling customer needs and offering the appropriate products; therefore, solid interpersonal skills and effective referral skills are necessary as well. In addition, successful Personal Bankers are effective in applying bank policies and procedures, particularly account opening procedures. Successful Personal Bankers use a customer-focused, needs-based sales approach in carrying out their responsibilities. Superior performers are sales- and service-driven, professional in their conduct and appearance, and ethical in all their dealings. This course of study, leading to the AIB Personal Banking Diploma, addresses the appropriate mix of banking knowledge and skills leading to success.

Required Courses

You must complete the following courses.

Date	Grade	Course
_____	_____	AIB Principles of Banking
_____	_____	AIB Building and Retaining Customer Relationships
_____	_____	AIB Consumer Credit Products
_____	_____	AIB Cross-Selling Deposit Products
_____	_____	AIB Dealing Effectively with Co-Workers
_____	_____	AIB Effective Referrals
_____	_____	AIB Ethical Issues for Bankers
_____	_____	AIB Fundamentals of Consumer Lending
_____	_____	AIB Introduction to Relationship Selling
_____	_____	AIB Managing Time at Work
_____	_____	AIB Overview of Financial Statements
_____	_____	AIB Profiling Mortgage Prospects
_____	_____	AIB Regulatory Compliance for Personal Bankers
_____	_____	AIB Tele-Consulting
_____	_____	AIB Writing Bank Correspondence

The AIB Personal Banking Diploma meets the pre-certification education requirements for the Certified Personal Banker (CPB) designation through the Institute of Certified Bankers (ICB).

When you have completed the required courses, send this completed form to your Local ABA Training Provider: West Virginia Bankers Association, 120 Washington St. E., Charleston WV 25301 or fax to 304-343-9749. If you have college courses for review for transfer to the AIB program, please ask the college to send us an official transcript. For questions regarding AIB classes, email datkinson@wvbankers.org or call us at 800-343-8038 or 304-343-8838.

Name

Date

AIB Personal Trust Diploma

The AIB Personal Trust Diploma was developed to prepare individuals for professional certification as a Certified Trust and Financial Advisor (CTFA), through the Institute of Certified Bankers (ICB). Becoming a Certified Trust and Financial Advisor is one of the most important and rewarding career decisions that a trust professional can make. Those holding the CTFA designation often speak to the competitive advantage and professional recognition that it affords. The 20 trust courses in the three curricula, Personal Trust Curriculum Level 1, Personal Trust Curriculum Level 2, and Personal Trust Curriculum Level 3 provide the technical underpinning of the diploma and address the core knowledge areas of the CTFA examination. In addition, the critical importance of ethical conduct in all aspects of the trust profession is reinforced in AIB Ethical Issues for Bankers.

While the curriculum addresses the major knowledge areas assessed by the examination, ICB emphasizes that completion of this diploma does not guarantee success on the CTFA examination. Experience and application of the knowledge to the work setting are important factors as well.

Required Courses

You must complete the following courses.

Date	Grade	Course
_____	_____	AIB Ethical Issues for Bankers

AIB Personal Trust Curriculum Level 1

_____	_____	AIB Building Trust Expertise - Investment
_____	_____	AIB Building Trust Expertise - Taxation & Estate Planning
_____	_____	AIB Building Trust Expertise - Trust Administration

AIB Personal Trust Curriculum Level 2

_____	_____	AIB Discretionary Distributions
_____	_____	AIB Estate Planning for Marital Deduction
_____	_____	AIB Estate Planning Overview
_____	_____	AIB Federal Estate and Gift Taxes
_____	_____	AIB Fiduciary Income Taxes
_____	_____	AIB Fiduciary Law
_____	_____	AIB Investments I
_____	_____	AIB Managing Trust Accounts
_____	_____	AIB Retirement Planning

AIB Personal Trust Curriculum Level 3

_____	_____	AIB Estate Planning Case Study
_____	_____	AIB Estate Planning for the Business Owner
_____	_____	AIB Estate Planning for Charitable Giving
_____	_____	AIB Estate Planning for Lifetime Gifts
_____	_____	AIB Financial Planning Skills
_____	_____	AIB Generation Skipping Transfer Tax
_____	_____	AIB Investments II
_____	_____	AIB Life Insurance and Annuities

The AIB Personal Trust Diploma meets the pre-certification education requirements for the Certified Trust and Financial Advisor (CTFA) designation through the Institute of Certified Bankers (ICB).

When you have completed the required courses, send this completed form to your Local ABA Training Provider: West Virginia Bankers Association, 120 Washington St. E., Charleston WV 25301 or fax to 304-343-9749. If you have college courses for review for transfer to the AIB program, please ask the college to send us an official transcript. For questions regarding AIB classes, email datkinson@wvbankers.org or call us at 800-343-8038 or 304-343-8838.

Name

Date

AIB Retail Branch Management Diploma

Retail Branch Managers require breadth and depth of banking knowledge and related skills to be successful. Their jobs are among the most challenging and rewarding ones in banking. Retail Branch Managers manage the activities of branch offices and offer deposit and loan products to business and individuals. The responsibilities of Retail Branch Managers require expertise in branch operations, staff supervision and development, and sales management among many other competencies.

Retail Branch Managers must understand bank and branch policies and procedures and have a working knowledge of all bank products and bank functions. In addition to broad knowledge of banking and banking operations, skills in lending, management and supervision, sales and customer service are indispensable. Successful Retail Branch Managers are also leaders in their banks (and often in their communities) and demonstrate ethical behavior in all dealings — with customers and co-workers.

This curriculum prepares individuals to manage a banking office by covering banking essentials, sales management, people management and business management skills.

Required Courses

You must complete the following courses.

Date	Grade	Course
_____	_____	AIB Principles of Banking
_____	_____	AIB Building and Retaining Customer Relationships
_____	_____	AIB Calling on Small Business Customers
_____	_____	AIB Effective Referrals
_____	_____	AIB Ethical Issues for Bankers
_____	_____	AIB Event-Based Selling
_____	_____	AIB Fundamentals of Consumer Lending
_____	_____	AIB Fundamentals of Mortgage Lending
_____	_____	AIB Fundamentals of Small Business Banking
_____	_____	AIB Introduction to Relationship Selling
_____	_____	AIB Law & Banking: Applications
_____	_____	AIB Law & Banking: Principles
_____	_____	AIB Managing Change
_____	_____	AIB Managing Time at Work
_____	_____	AIB Presentation Skills
_____	_____	AIB Sales Coaching in the Bank
_____	_____	AIB Servicing and Growing Small Business Relationships
_____	_____	AIB Supervision or AIB Supervisor Certificate
_____	_____	AIB Successful Sales Campaigns
_____	_____	AIB Writing Bank Correspondence

When you have completed the required courses, send this completed form to your Local ABA Training Provider: West Virginia Bankers Association, 120 Washington St. E., Charleston WV 25301 or fax to 304-343-9749. If you have college courses for review for transfer to the AIB program, please ask the college to send us an official transcript. For questions regarding AIB classes, email datkinson@wvbankers.org or call us at 800-343-8038 or 304-343-8838.

Name

Date

AIB Bank Teller Certificate

Tellers represent the front line of most banks. In addition to cashing checks and accepting savings deposits and withdrawals, tellers may have to perform specialized duties, such as accepting loan, credit, utility and other payments. Tellers are responsible for maintaining accurate records of all transactions and for preparing daily settlements of teller cash and proof transactions.

Tellers must understand teller policies and procedures and apply technical teller skills as reflected in the duties of their jobs. In addition to handling money well, effective tellers must be service-oriented and work effectively with the public as well as with co-workers.

The curriculum for the AIB Bank Teller Certificate is centered on AIB Today's Teller, which addresses the critical technical skills of the position. The remaining courses address practical knowledge and applied skills in banking, regulatory compliance for tellers, and customer service and sales.

Required Courses

You must complete the following courses.

Date	Grade	Course
_____	_____	AIB Banking Today
_____	_____	AIB Business Etiquette
_____	_____	AIB Dealing Effectively with Co-Workers
_____	_____	AIB Effective Referrals
_____	_____	AIB Ethical Issues for Bankers
_____	_____	AIB Introduction to Relationship Selling
_____	_____	AIB Regulatory Compliance for Tellers
_____	_____	AIB Revitalizing Customer Service
_____	_____	AIB Today's Teller or
_____	_____	Teller Training Essentials

The AIB Bank Teller Certificate meets the pre-certification education requirements for the Certified Bank Teller (CBT) designation through the Institute of Certified Bankers (ICB).

When you have completed the required courses, send this completed form to your Local ABA Training Provider: West Virginia Bankers Association, 120 Washington St. E., Charleston WV 25301 or fax to 304-343-9749. If you have college courses for review for transfer to the AIB program, please ask the college to send us an official transcript. For questions regarding AIB classes, email datkinson@wvbankers.org or call us at 800-343-8038 or 304-343-8838.

Name

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AIB Call Center Representative Certificate

Call Center Representatives process inbound calls and perform other telemarketing duties as necessary. Call Center Representatives are responsible for identifying and handling customer inquiries in a prompt and courteous fashion. Representatives often sell and cross-sell deposit and credit products and services as well as, open accounts for retail customers.

To be successful, Call Center Representatives must have the appropriate level of understanding of retail products, in addition to understanding bank policies and procedures. Call Center Representatives must communicate well and apply sales skills effectively. Telephone skills, including telephone etiquette, are critical to the position.

The curriculum for the AIB Call Center Representative Certificate addresses the knowledge and skills necessary to become a superior Call Center Representative. In addition to fundamental understanding of banking and banking regulations affecting the position, the required courses emphasize telephone skills, product knowledge, sales and customer service.

Required Courses

You must complete the following courses.

Date	Grade	Course
_____	_____	AIB Banking Today
_____	_____	AIB Cross-Selling Deposit Products
_____	_____	AIB Dealing Effectively with Co-Workers
_____	_____	AIB Effective Referrals
_____	_____	AIB Ethical Issues for Bankers
_____	_____	AIB Introduction to Relationship Selling
_____	_____	AIB Regulatory Compliance for Call Center Representatives
_____	_____	AIB Revitalizing Customer Service
_____	_____	AIB Tele-consulting
_____	_____	AIB Telephone Etiquette
_____	_____	AIB Understanding Bank Products

The AIB Call Center Representative Certificate meets the pre-certification education requirements for the Certified Call Center Representative designation through the Institute of Certified Bankers (ICB).

Applicants can purchase all of the required courses for this certificate as a self-paced online training package. Contact WVBA to register.

When you have completed the required courses, send this completed form to your Local ABA Training Provider: West Virginia Bankers Association, 120 Washington St. E., Charleston WV 25301 or fax to 304-343-9749. If you have college courses for review for transfer to the AIB program, please ask the college to send us an official transcript. For questions regarding AIB classes, email datkinson@wvbankers.org or call us at 800-343-8038 or 304-343-8838.

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AIB Customer Service Representative Certificate

Customer Service Representatives (CSRs) conduct basic banking transactions and cross-sell bank products/services. Successful CSRs respond to basic customer inquiries in a knowledgeable and courteous manner, and resolve customer problems when they arise. To respond effectively to customer needs, CSRs must have a thorough understanding of retail products and services, as well as pertinent bank policies and procedures. CSRs apply customer service skills in addressing customer inquiries and concerns. Basic selling and cross-selling skills are necessary as well. In many situations, CSRs are the "face" of the bank. A customer-focused, service orientation is essential, accompanied by an ethical and sincere approach to customer relations.

The AIB Customer Service Representative Certificate addresses the knowledge and skills necessary to achieve superior performance in this important position within the bank. In addition to courses that address sales and customer service, the curriculum also emphasizes regulatory compliance, business ethics and banking fundamentals.

Required Courses:

You must complete the following courses.

Date	Grade	Course
_____	_____	AIB Banking Today
_____	_____	AIB Building and Retaining Customer Relationships
_____	_____	AIB Cross-Selling Deposit Products
_____	_____	AIB Dealing Effectively with Co-Workers
_____	_____	AIB Effective Referrals
_____	_____	AIB Ethical Issues for Bankers
_____	_____	AIB Introduction to Relationship Selling
_____	_____	AIB Regulatory Compliance for Customer Service Representatives
_____	_____	AIB Revitalizing Customer Service
_____	_____	AIB Telephone Etiquette
_____	_____	AIB Understanding Bank Products

The AIB Customer Service Representative Certificate meets the pre-certification education requirements for the Certified Customer Service Representative (CCSR) designation through the Institute of Certified Bankers (ICB).

Applicants can purchase all of the required courses for this certificate as a self-paced online training package. Contact WVBA to register.

When you have completed the required courses, send this completed form to your Local ABA Training Provider: West Virginia Bankers Association, 120 Washington St. E., Charleston WV 25301 or fax to 304-343-9749. If you have college courses for review for transfer to the AIB program, please ask the college to send us an official transcript. For questions regarding AIB classes, email datkinson@wvbankers.org or call us at 800-343-8038 or 304-343-8838.

Name

Date

AIB Supervisor Certificate

Supervision is always a challenge, especially for the newly appointed supervisor. Supervision, often considered first-level management, involves overseeing the work of others using a combination of leadership and managerial skills. ABA's research findings indicate that sound supervisory skills are among the most important ones in banking. The ability to work effectively with people, especially with respect to inspiring and developing staff, is a critical competency for all career bankers.

The AIB Supervisor Certificate prepares new and potential supervisors for their emerging responsibilities by offering fresh insights on proven supervisory approaches. The courses in the program explore ways to interview, evaluate and select employees, while being mindful of legal considerations. The performance management process is reviewed in detail, with special attention placed on coaching, rewards and recognition, and corrective action. Managing employee relations is addressed through four major strategies: compliance with laws, managing diversity, handling work and personal issues, and fostering open communication among staff members. In addition, the certificate program includes a component on ethical practices in banking.

Required Courses:

You must complete the following courses.

Date	Grade	Course
_____	_____	AIB Banking Today
_____	_____	AIB Coaching for Success
_____	_____	AIB Corrective Action
_____	_____	AIB Ethical Issues for Bankers
_____	_____	AIB Hiring the Best
_____	_____	AIB Managing Employee Relations
_____	_____	AIB Performance Management
_____	_____	AIB Rewards and Recognition

This certificate is also available as an AIB Online Course. Students must complete the certificate course **plus** AIB Banking Today.

Applicants can purchase all of the required courses for this certificate as a self-paced online training package. Contact WVBA to register.

AIB Course Code for online option only: 4322

When you have completed the required courses, send this completed form to your Local ABA Training Provider: West Virginia Bankers Association, 120 Washington St. E., Charleston WV 25301 or fax to 304-343-9749. If you have college courses for review for transfer to the AIB program, please ask the college to send us an official transcript. For questions regarding AIB classes, email datkinson@wvbankers.org or call us at 800-343-8038 or 304-343-8838.

Name

Date

AIB Team Leader Certificate

In today's competitive environment it is critical to leverage the power of teams to provide solutions to problems, to innovate and enhance organizational capabilities, and to take advantage of emerging business opportunities. The potential effectiveness of a high performing team far exceeds the ability of any single manager. To build a successful team requires a leader who possesses the knowledge and skills to build a climate of trust, leverage personal strengths of team members, manage team weaknesses, and set meaningful goals and expectations. Successful team leaders focus on both team purpose and individual tasks, promote shared responsibility for results, identify appropriate methods for rewards and recognition, and communicate effectively with team members and stakeholders. They also coach team members and help manage the change process.

This certificate is designed to help individuals develop the necessary skills to lead and manage effective teams. The courses in the program have been developed for bankers, and are presented in a banking context. The program is appropriate for bankers who have direct supervisory responsibility for team members and for bankers who collaborate with others in the bank on occasion to meet common objectives and achieve specific results.

Required Courses:

You must complete the following courses.

Date	Grade	Course
_____	_____	AIB Banking Today
_____	_____	AIB Coaching for Success
_____	_____	AIB Dealing Effectively with Co-Workers
_____	_____	AIB Managing Change
_____	_____	AIB Meetings that Work
_____	_____	AIB Presentation Skills or Improving Productivity
_____	_____	AIB Rewards and Recognition
_____	_____	AIB Writing Bank Correspondence

Applicants can purchase all of the required courses for this certificate as a self-paced online training package. Contact WVBA to register.

AIB Course Code for online option is: 4148.

When you have completed the required courses, send this completed form to your Local ABA Training Provider: West Virginia Bankers Association, 120 Washington St. E., Charleston WV 25301 or fax to 304-343-9749. If you have college courses for review for transfer to the AIB program, please ask the college to send us an official transcript. For questions regarding AIB classes, email datkinson@wvbankers.org or call us at 800-343-8038 or 304-343-8838.