



CUIC[®] Courses – At a Glance

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	CU00-185 Products & Services	CU00-200 The Credit Union System	CU00-210 Consumer & Residential Mortgage Lending	CU00-225 Financial Management	CU00-235 Marketing & Sales Management	CU00-240 Fundamentals of Personal Financial Planning	CU00-315 Strategic Management	CU00-325 Human Resources Management	CU00-340 Commercial Mortgage Lending	CU01-345 Commercial Lending	CU00-346 Agricultural Lending
Module 1	Saving Services	The Distinct Nature of Credit Union Operations	Introduction To Consumer Lending	Finance Function: An Overview	Marketing in the 21st Century	The Financial Planning Process	Strategic Management Overview	A Strategic Perspective	Commercial Mortgages Lending	Introduction to Commercial Lending Practices	Introduction to Agricultural Lending
Module 2	Registered Plans	The Credit Union as a Financial Co-operative	The Loan Application Process	Interpreting Financial Success Using Financial Statements, Ratio & Trend Analysis	The Challenges of Services for Marketing	Net Worth, Cash Flow & Debt Management	Analyzing the External Environment	HR Planning Process	Credit Unions & Commercial Mortgage Lending	Financial Statements	Farm Product Marketing
Module 3	Lending Services	The Canadian Credit Union System	The Credit Decision	Financial Structure & Asset Management	Winning Markets: Market Orientated Strategies	Risk Management & the Role of Insurance	Analyzing the Internal Environment	Employment Equity and Diversity Management	Beginning the Loan	Cash Flow	Risk Characteristics
Module 4	Card Services	The Canadian Financial Services Industry	Loan Documentation, Monitoring, Collections & Financial Guidance	Time Value of Money Considerations	Relationship Marketing	The Financial Marketplace & Investment Products	Recognizing Intellectual Assets	Organizational Culture	Appraisal & Evaluation	Loan Investigation Process	Agricultural Lending in Credit Unions
Module 5	Transaction Services	Financial Management Principles for Deposit-Taking Institutions	Mortgage Law & Mortgage Insurers	Macro-economic Considerations	Scanning the Environment; Analyzing the Competition	Investment Planning	Business Level Strategy	Organizational Staffing	Analyzing the Credit Application	Security Values and Appraisals	The Loan Application Process
Module 6	Investment Services	The Regulatory Environment	Processing The Mortgage Loan Application	Risk Management Considerations	Analyzing Buyer Behaviour; Managing Relationships	The Income Tax System	Corporate Level Strategy	Training & Development	Special-Purpose Financing	Structuring a Commercial Loan	Financial Analysis
Module 7	Trust Services	Products & Services: The Ongoing Evolution	Mortgage Loan Application	Asset/Liability Management (ALM)	Segmenting, Target Marketing & Positioning; The Core Marketing Tasks	Tax Planning	Digital Business Strategy	Compensation	Disbursements, Documentation & Monitoring	Loan Disbursement & Monitoring	Assessing the Farmer
Module 8	Insurance Services	Understanding Your Credit Union's Financial Statements	Discharge & Prepayment Procedures	Capital Adequacy & Deposit Protection	Managing Products & Brands	Retirement Planning	Strategy Control & Corporate Governance	Supporting Employee Health & Well-Being	Problem Accounts	Problem Accounts	Collateral Appraisal & Evaluation
Module 9	Financial Planning Services	The Co-operative Network	Member Contact Skills	Operational Issues For The Financial Officer	Managing Pricing	Estate Planning	Creating Effective Organizational Designs	Employee & Employer Rights & Responsibilities	Business Development	Prospecting for Commercial Loans	Security, Legal Issues & Disbursements Plans
Module 10	Sundry Services	The Future for Credit Unions: Opportunities & Challenges	Business Development: Methods & Activities	Financial Reporting	Managing Delivery Channels, Service Channels & the Sales Force	The Comprehensive Financial Plan	Strategic Leadership	Labour Relations	Negotiating & Closing	Negotiating & Closing	Monitoring & Collections
Module 11					Integrated Marketing Communications						