

Coming Soon – Three Programs for Retail Lenders!

In Fall 2004, CUSOURCE unveiled two new programs for commercial lenders. Now the spotlight is on three new certificate programs for retail lenders:

- Consumer Lender Program
- Residential Mortgage Lender Program
- Consumer and Residential Mortgage Lender Program – a combination of the other two programs.

Lending Skills and More

Like CUSOURCE's two commercial lending programs, the courses that comprise each of the retail lending programs address knowledge and skill in several areas:

- The credit union system
- Consumer and/or residential mortgage lending
- Negotiation skills
- Credit union products and services

- Business communication
- Risk management and security
- Sales and service skills
- Ethical awareness
- General business fundamentals

The individual courses that comprise each program are a mix of instructor-led classroom courses, web and CUIC "correspondence" courses. The courses vary in length from 2-hour NETg courses to the 15-week CUIC university-level courses.

"These programs will help us as a system develop individuals who have a broad base of knowledge and skills that extend beyond lending. We need employees who can express themselves well, who have an understanding of business generally and our business as a financial intermediary specifically," commented **Dick Williams**, chair of the National Lenders' Education Committee. "We also want rigorous

certificate programs that set national standards for lending as it is such a key operational area. These standards are important. Individuals who complete these programs want a certificate that attests to their competence – that enhances their 'promotability' and employability. Further, credit unions that need to hire lenders can ask for these certificates and have confidence in what they represent."

Courses Apply to Other CUSOURCE/CUIC Programs

An additional benefit of CUSOURCE's programs is that some of the courses required for one program may be applied to another CUSOURCE program. The NETg business communication courses and the *Credit Union System* course are perfect examples. You can maximize time and money!

Watch for details...

Watch for more details under CUSOURCE Catalogue at www.cusource.ca

Mortgage Lenders Encouraged to Seek CIMBL Designation

CUSOURCE's *Credit Union Consumer & Residential Mortgage Lending* course now qualifies as a "proficiency" course for the Canadian Institute of Mortgage Brokers and Lenders' (CIMBL) Accredited Mortgage Professional (AMP) designation.

"We are very pleased with this recognition," commented **Cheryl Byrne**, Executive Director, CUSOURCE Credit Union Knowledge Network. "It is an example of the kind of relationship we want to foster with the broader financial services industry."

"But there is another aspect that is equally important here," Cheryl continued. "People today want assurance that they are dealing with qualified professionals. They look for credentials. That is especially true when they want to buy a home – probably, the largest single purchase of their lives."

"So, we encourage qualified credit union lenders to apply for CIMBL's AMP designation. It will enhance their personal credibility. Plus, it assures the public that when they deal with credit unions, they are dealing with industry-recognized

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CIMBL designation...

professionals. This is vital to credit unions' competitive position in the financial services marketplace."

About CIMBL

CIMBL is the national organization representing Canada's mortgage industry. Its aim is to enhance professionalism through the enforcement of a Code of Ethics, adherence to best practices, harmonization of education standards,

fraud prevention, informative publications and improved public profile.

The Accredited Mortgage Professional (AMP) is a national designation for mortgage professionals. Launched in 2004, the AMP was developed by CIMBL as part of an ongoing commitment to increasing the level of professionalism in Canada's mortgage industry through the development of educational and ethical standards.

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For more information about the AMP designation, visit www.cimbl.ca (on the CUSOURCE Knowledge Exchange under Professional Development).

Check out the list of individuals, including credit union employees, who have already received their AMP designation at http://www.cimbl.ca/download_docs/AMP_list_April15_2005.pdf

CU01-210-WEB... "On Demand" Lending Training Takes on New Colour & Sound

The cornerstone for the three retail lending programs is the newly updated *Credit Union Consumer & Residential Mortgage Lending* course. The course is available in both paper and web versions, but the latter gives employees options – more flexibility than they ever had with a CUIC paper-based course. For example, enroll in CU00-210 (paper) and you receive all 10 modules of the course, whether you need them or not. But entertain the idea of web-learning and you have new options! Now you can treat the 10 modules of 210 as a "menu of knowledge of skills" from which you can:

- Choose specific modules based on the requirements of the lending program in which you are interested.

For example, if you are interested in consumer lending only, you could enroll in modules 1 to 4 (\$95 per module.)

- Choose specific modules based on your own particular knowledge gaps. (\$95 per module.)
- Choose the entire course i.e., all ten modules in one bundle. (\$450)

Free Sample

You can "sample" CU01-210-WEB by enrolling in *Introduction to Consumer Lending* (CU01-210-M1) in the Catalogue. It's free! Whether you are involved in consumer lending or not, try a byte. It's a wonderful introduction to web-learning.

Sound Bytes

"I really liked this web course!" exclaimed **Maureen Modin** (East Kootenay Community.) "It increased my concentration and I liked being able to re-do the assessments as often as and whenever I wanted to. I also enjoyed the case studies because I could relate them to what happens daily at work. I took advantage of all of the interactive features, too, including trying every drop down box!"

"The graphics, the talking, the role-playing – the whole interactive aspect really kept me alert," **Nicole Pickup** (Rideau/St. Lawrence Community) explained. "I printed the notes at the end of each module to study; then went back and did the self-tests at the end of each module. I liked everything about the course."

"I liked having the course broken down into individual modules," commented **Tracy Harink**, (Eckville District Savings). "It feels less overwhelming than a large binder."

It's a Fact...

- By the end of May, close to 200 credit unions were CUSOURCE Corporate Subscribers. This includes credit unions with several hundred employees to those with fewer than 5.
- CUSOURCE's web course *Detecting and Preventing Money Laundering* counts for 4 technical Continuing Education (CE) credits with the Financial Planners Standards Council. CUSOURCE's *It's a Matter of Privacy* counts for 2 CE credits. Both courses are included in CUSOURCE's \$40 Annual Individual Subscription Fee. Guidelines for the CE credits can be found on the FPSCC's web site: http://www.cfp-ca.org/licensees/licensees_courses.asp.

210-Cohort Receives “Thumbs Up”

“I wish I had done this course years ago,” said **Sandra Pye** (Eagle River). “It is so relevant to my position. And, I love computers and trying different things. I don’t have time during the day to do any training so I did the course from the web at home. This style of learning where we have a schedule and deadlines is much better for me. It kept me on track and on time so I wasn’t cramming before the final exam. The other aspect I really enjoyed was being able to “talk” with others. The discussion forum gave me the opportunity to get tips, ask questions, give advice and find out what others do at their credit union. That was really interesting.”

Sandra is one of approximately twenty-five individuals who has now completed the *Consumer & Residential Mortgage Lending* course by enrolling in an on-line cohort or class. Close to fifty students have now completed the *Credit Union Commercial Lending* (CU00-345) course via a cohort.

Cohorts – Structure and Flexibility

Unlike a typical classroom setting which is a “synchronous” learning event (i.e., instruction occurs among participants on a specific day and time), the cohorts are “asynchronous”. In this case, the facilitator may, for example, post questions or observations about a particular section of the course to

a discussion forum on Monday and ask that you respond by the following Sunday. Within those six days, you schedule your time. You decide when you review the study material, respond to the facilitator’s questions and share ideas with your “classmates”, who may be at a credit union anywhere in Canada. Then the next week, you move ahead to the next module.

But with that flexibility, there is commitment. As a cohort participant, you need to:

- submit two written assignments by prescribed deadlines
- use the discussion forum to respond to the facilitator’s questions and dialogue with your peers
- write the final exam at the end of the cohort.

The final mark is a composite of those 3 components: participation in the discussion forum (10%), assignments (40%) and the final exam (50%). Note, you do need to pass the final exam with a minimum of 60%.

“Seats” are Limited. Enroll Now.

Enroll in a Fall cohort before August 22 and you can jump-start working through the course. Because the courses are web-based, as soon as you enroll in the cohort, you have immediate access to the course.

Sound Bytes

“Kathy (Clutterbuck) and Sharron (Taylor) were great facilitators. If you had a question, they were right on top of it. I found the discussion forum interesting because you could get feedback on the course material from other people, not just those in your own credit union. Everyone has their own policies, practices and perspectives. The discussion forum added another dimension to the course.” **Karen Debenedictis** (Prime Savings)

“I like the idea of working at my own pace but also want to know that there is a facilitator available. I really benefited from the facilitator. I also really liked the visual presentation of the web-course. It made the material much more interesting. I would go through the web material first then, at the end of the modules, print the notes and review those. I would encourage everyone to take the course in a cohort.”

Barb Schiller
(Operating Engineers)

Facts about the Fall Lending Cohorts

Courses: CU01-210-COHORT Consumer & Residential Mortgage Lending
CU00-345-COHORT Commercial Lending

Start date: August 22nd

Enroll by: August 12th

Session ends: December 7th with the final exam.

Tuition fee: \$650 (includes web course and the final exam.)

Final Grade: A composite of the *CUIC exam*, *2 written assignments* and *participation* in an on-line discussion forum.

The Discussion Continues

The cohort may end but the discussion continues! Where? On the CUSOURCE Knowledge Exchange! Click on **Lenders** under **Communities of Practice**. There is a discussion board for each lending specialty. Cohort “grads” and lenders across the system are encouraged to use these e-boards to keep their discussion alive!

Advanced Commercial Lender Course – Commercial Lending with a People Flare

“Imagine. We spent three days on commercial lending and never touched a calculator. Now that was refreshing!” **Bob Upton**, Manager of Lending Services, Credit Union Central of Nova Scotia was more enthusiastic about this course than he dreamed possible. With over 25 years in commercial lending under his belt (most of it acquired with the “big six” banks), what could he possibly hear that he hadn’t heard before?

“Sure, you have to do the calculations and analysis. It’s part of your due diligence,” Bob continued. “But André [Schroer] – the facilitator – brings ‘people’ back into the lending equation, something the banks have forgotten. The course also reinforced the principles of the credit union system without compromising the technical side. The assumption going into this course is that you know how to calculate and analyze numbers. That meant when we were examining case studies that we could use our experience, discuss questions of judgement, stretch our thinking.”

“The other aspect I enjoyed was spending real quality time with other commercial lenders after class, over dinner. That’s where a different type of learning happens. It builds community.”

\$1 million in loans in 1 week. Now That’s ROI!

Gail Roubos, Commercial Lending Officer, Innisfil-Shelburne Credit Union quantified her experience at this advanced lenders’ course. “Those three days working with André were so re-affirming! They confirmed that I do have sound judgement that goes beyond just analyzing numbers. By the end of my first week back in the office, I booked \$1 million in loans! Would I have made them anyway, without going to this course? Yes. But I was able to make my decisions more quickly and confidently. It feels great! Would I recommend this course to others? I sure would.”

Commercial Loans – a “Moving Target”

Even with 17 plus years of experience, that’s how **Rick McKay**, Assistant Manager, Lending, Mennonite Credit Union still describes commercial lending.

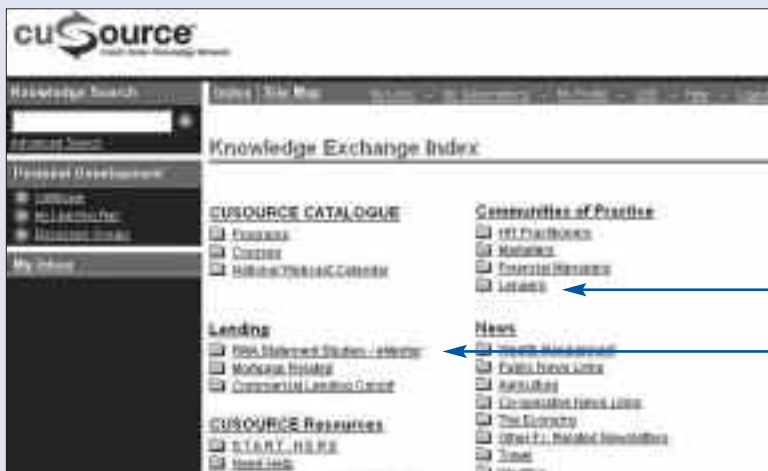
“There are always different aspects to consider with any commercial loan. You’re always learning something. That’s why I enjoyed this course. It was more ‘philosophical’. You didn’t spend time calculating ratios. You learned from others’ experience. André would give us a

case; break us into groups and then ask, ‘Based on what you know, would you grant this loan? Why or why not?’ Then, he would give us a bit more information. ‘Now what would you do?’ he’d ask.”

“We had an interesting discussion about unlimited guarantees, for example, and whether or not we should use them. One of the participants was from our deposit insurer. He often challenged our thinking. It was good to learn more about his perspective. Was their value in this course? Definitely!”

Part of the Commercial Lender Program

This advanced 3-day course is a required course in CUSOURCE’s Commercial Lender Program. For more details, go to www.cusource.ca. Click on **Course Catalogue, Classroom, Lending**, then CU02-ALC. To find out when the course is coming to your region, refer to your CUSOURCE Regional Calendar, contact your Regional Office or click on the course in the CUSOURCE Catalogue.



For Your Lending Tool Kit

Explore CUSOURCE’s Knowledge Exchange and you’ll discover at least two items to add to your lending tool kit:

- Discussion Forums. Look under the “Communities of Practice” on the Knowledge Exchange.
- RMA’s eMentorSM – a knowledge, information and desktop training tool that brings resources right to your desktop.

There is no additional charge for either of these tools. They are included in your \$40 CUSOURCE subscription fee and are a part of the ongoing value.

Harvard's Coaching for Results Rates "Excellent"

Harvard Business School Publishing's online course *Coaching for Results* won an "excellent" rating from Gene Baynham of Heartland Community Credit Union (ON). *Coaching for Results* is one of twelve courses from HBSP's Essential Leadership Series that are in the CUSOURCE Catalogue. Read Gene's comments and the ratings of two other HBSP courses. Then, enroll yourself. Finally, share your comments in the open Discussion Group, accessible via the CUSOURCE Knowledge Exchange. Each HBSP course costs \$150 CDN – minimal investment for what seems to be great value. But, you decide. Harvard ManageMentor® costs \$220 per year for access to 33 mentors.

Rating: Scale 1 to 5 1 = poor 5 = excellent	Harvard course: <i>Coaching for Results</i> Gene Baynham Senior Manager, Retail Banking Heartland Community (ON)	Harvard course: <i>What is a Leader?</i> David Perri Regional Director, Sales & Service VanCity Savings (BC)	<i>Managing Your Time</i> from Harvard ManageMentor® Mary Anita Gerrior General Manager, East Coast (NS)
Content	5	4	4
User friendliness	5	4	4
Was there a feature you really liked?	The video clips allow you to understand situations more completely.	The video examples as this really helped to illustrate the situations.	I really liked the way the course came back several times to the main points i.e., the phases of time management.
Does the material have "real-life application?"	Definitely. Very thought provoking. Coaching is ongoing and more important than ever.	Opportunities present themselves daily that are easy to respond to. However, the design of this course allows you to try the concepts presented and view the potential outcomes of your actions.	Yes!
Value for Money?	I enjoyed every minute. I hope the Credit Union felt it was worthwhile giving me this opportunity.	Absolutely.	Definitely.
Other comments	The longer we coach, the more we think we know... not true! This course made me re-evaluate my approach and provided me with tools to coach in a more effective way – "talking less; listening more; and being better prepared." I really enjoyed this learning experience.	The course allows you to deal with real, everyday experiences and gauge what type of outcomes would be generated by your response and approach. I found this very helpful as sometimes it is easy to not look beyond the immediate horizon and thus deploy a short term solution. Having completed this course, I now seem to ask more questions than I did before and don't instinctively race to the quickest solution/response at hand. I would encourage anyone looking to expand their leadership skills to consider this course.	The course zeroed in on every day work habits. I was able to identify with all of the situations that make managing time a challenge – interruptions, phone, e-mails – and then, how to change goals.

ACCREDITED CREDIT UNION SALES AND SERVICE REPRESENTATIVES



MB
Cheryl Bouch
Accredited Sales &
Service Rep.
Winnipeg Police



MB
Heather Shurvell
Accredited Sales &
Service Rep.
Winnipeg Police



ON
Joan Sararas
Accredited Sales &
Service Rep.
Heartland
Community



SK
Cynthia Bosch
Accredited Sales &
Service Rep.
Cypress



SK
Patti Fischer
Accredited Sales &
Service Rep.
Cypress



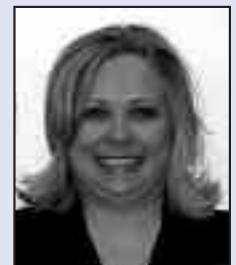
SK
Donna Johnson
Accredited Sales &
Service Rep.
Cypress



SK
Sabrina Kennedy
Accredited Sales &
Service Rep.
Cypress



SK
Marlene Menzies
Accredited Sales &
Service Rep.
Cypress



SK
Paulette Reamer
Accredited Sales &
Service Rep.
Cypress

CONGRATULATIONS TO ALL THE GRADUATES PICTURED ABOVE AND TO:

Gail Lachapelle
Accredited Sales & Service Rep.
Spectra
SK

CUIC FELLOW DESIGNATES



BC
Jason Round,
MBA, CFP, FCUIC,
Manager,
Wealth Mgmt Services
Credit Union Central of BC



BC
Susan Fisher,
FCUIC,
Accounting Clerk
Nelson & District



BC
Candace Tetreault,
FCUIC,
Commercial Services
Representative
Nelson & District



MB
Nancy Jo Moller,
FCUIC,
Account Manager Trainee
Austin



ON
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FCUIC,
Member Service Rep
Sudbury Regional



ON
Robert Leggo,
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Branch Manager
Waterloo Regional



PE
Karen Harding,
FCUIC,
Mktg & Trng Dept Asst
Credit Union Central



SK
Tara Beck,
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Marketing &
Communications Officer
Spectra



SK
Carrie-Lynn Denis,
FCUIC,
Member Account Manager
Ag/Commercial
BCU Financial



SK
Trina Helberg,
FCUIC,
Wealth Management
Representative
Foam Lake



SK
Connie Kohlen,
FCUIC,
Wealth Management
Representative
Gateway



SK
Brent Smith,
FCUIC,
Financial Service
Representative
Prince Albert

CONGRATULATIONS TO ALL THE GRADUATES PICTURED ABOVE AND TO THE FOLLOWING INDIVIDUALS:

Jennifer Annas, FCUIC,
1st Choice Savings
AB

Kulbir Parmar, FCUIC,
Khalsa
BC

Dallas Molloy, FCUIC,
Transcona
MB

Coralee Goleski, FCUIC,
CULEASE Financial Services
SK

Julie Voisin, FCUIC,
Conexus
SK

Vic Petersen, FCUIC,
Community Savings
AB

Carol Ann Pedersen, FCUIC,
Kootenay Savings
BC

Katryna Pernsky, FCUIC,
Kenora District
ON

Brenda Scheidt, FCUIC,
Kindersley
SK

CUIC ASSOCIATE DESIGNATES



SK
Marianne Engel, FCUIC, ACUIC
 Branch Manager
 Conexus



SK
Jim Rediger, FCUIC, ACUIC
 General Manager
 Canora

Congratulations!

Promotion for Recent GSP Graduate

“ Proof that taking courses does pay off. I have been a member services rep. and have just been promoted to Account Manager Trainee. Thank you for your assistance in reaching my goal.”

Nancy Jo Moller,
 Austin Credit Union (MB).

New Course Design Hits the Mark

Prior to 2005, supervisors who wanted to coach their member service employees through the Sales & Service Rep. Accreditation Program had to attend a two-day workshop. With the workshop came all of the pluses of face-to-face interaction, but all of the challenges associated with workshop delivery – enough participants, travel expenses, time away from the credit union etc.

Enter CUSOURCE Live technology and some creative thinking around a new program design. The result: a 9-week supervisor preparation course that involves 4 CUSOURCE Live sessions and 3 written assignments. Ten supervisors have now completed their training in this format. How did they feel about it? **Kathleen Holderbein**, Wainwright Credit Union Ltd., sent the following e-mail to CUSOURCE’s Sharron Taylor.

This has been such a learning experience for me.

When I was first asked by my Manager to participate in this course, I was very hesitant. Having seen the course material from another manager on our staff, I felt quite overwhelmed with all the information and the responsibility. Needless to say, my heart and soul were in this state when we had our first CUSOURCE Live session on April 14.

But, as my questions were answered at each session, my understanding became greater and my fears smaller. My confidence in the course and in myself increased a 1000 fold. As I finished my final assignment, I realized that I had just completed my own personal "layout" for this Accreditation program. That was awesome!

Now I am excited to see the impact that this program is going to have on our Credit Union in the weeks and years to come. Our focus has always been "the membership." But, we are also very

caring of our staff. The fact that our Management has made a commitment to this Sales & Service Rep. Accreditation Program says that they believe in the MSR front line. Management wants to honour and celebrate their "formal" learning and learning that has taken place on the job. This recognition improves their satisfaction and self-esteem which will lead to greater member satisfaction and increased revenues. It just is a WIN-WIN program to me! I look forward to our last session on Thursday. Thank you for everything!

The next supervisor on-line prep. course starts on September 15th. To enroll, click on CU02-STSRACC Supervisor Training for Service Representative Accreditation Program under Human Resources in the CUSOURCE Catalogue.

To attend a two-day workshop, contact your CUSOURCE Regional Office.

Exam Report

November 2004 and March 2005

Here is the summary of results for the November 2004 and March 2005 exam sittings.

CUIC Exams	Number Writing Exam		% of Students Who Scored 60% or Higher		Highest Mark on the Exam (%)		Average Mark (%)	
	Nov 2004	Mar 2005	Nov 2004	Mar 2005	Nov 2004	Mar 2005	Nov 2004	Mar 2005
Sales & Service Accreditation	30	6	93	100	84	87	72	74
CU00-185	121	101	88	88	90	91	72	72
CU00-200	135	80	82	83	93	95	72	72
CU00-210	168	152	94	88	90	91	72	70
CU00-225	12	9	92	100	88	87	74	76
CU00-235	8	5	100	100	79	81	72	70
CU00-240	63	63	84	90	86	91	70	73
CU00-315	8	n/a	100	n/a	90	n/a	81	n/a
CU00-325	35	n/a	97	n/a	90	n/a	76	n/a
CU00-340	17	n/a	94	n/a	88	n/a	75	n/a
CU00-345	34	40	94	95	89	86	72	72
CU00-346	20	n/a	95	n/a	85	n/a	75	n/a
Total	651	451						

* n/a = not available in March exam session

Next CUIC Exam Session

Exam date: November 23, 2005

Exam registration period: September 9 – October 7

Cancel/unenroll without penalty: By October 17

- Enroll in a CUIC paper-edition course now to give yourself adequate study time.
- Enroll in web *Consumer & Residential Mortgage Lending* (CU01-210-Web) or web *Commercial Lending* (CU00-345-Web) and you have immediate access to your course **plus** the ability to print if you want to.

TOP SCORERS

Congratulations to the following individuals who scored the highest grade in their respective courses.

COURSE	NAME	CREDIT UNION	PROV
Sales & Service Rep Accreditation			
Nov 2004	Lisa Scott	Westoba	MB
Mar 2005	Carol Lesko	South Interlake	MB
CU00-185			
Nov 2004	Cheryl Kelley	Servus	AB
Mar 2005	Wayne Thorpe Vicki Kremp	Conexus Common Wealth	SK AB
CU00-200			
Nov 2004	Ericka Hewitt Roxanne Diesen Jason Round Brent Smith Terry Hardy	Coastal Community BCU Financial Credit Union Central of BC Prince Albert Codroy Valley	BC SK BC SK NL
Mar 2005			
CU00-210			
Nov 2004	David Melsted	Coastal Community	BC
Mar 2005	Tasha Stoddart	Credit Union Atlantic	NS
CU00-225			
Nov 2004	David Morgan	South Interlake	MB
Mar 2005	Lynn D. Kerr	Prairie Centre	SK
CU00-235			
Nov 2004	Martin Groote	Bulkley Valley	BC
Mar 2005	Juliette Zwarych	Gateway	SK
CU00-240			
Nov 2004	Denise Robert	Saskatoon	SK
Mar 2005	Jacques Decorby	Moosomin	SK
CU00-315			
Nov 2004	Lorrie Waronek	CU Deposit Guarantee Corp	SK
CU00-325			
Nov 2004	Tamia Hatler	Bulkley Valley	BC
CU00-340			
Nov 2004	Bill Sherritt	Vancouver City Savings	BC
CU00-345			
Nov 2004	Ryan Dmytruk	Prince Albert	SK
Mar 2005	Marcia Greenwood Chris Buchan Cherryl Harvey Cordell Schaan	Spectra Conexus DUCA Financial Services Churchbridge	SK SK SK ON SK
CU00-346			
Nov 2004	Grace Pinkney Rachael Yuristy	White Fox Savings Horizon	SK SK

Bachelor Degree in Applied Financial Services Now Closer for CUIC Grads

If you have both the CUIC Fellow and Associate designations, you are just three courses away from applying for admission into the third year of Lakeland College's four-year **Bachelor Degree in Applied Financial Services**. Which three courses? The three remaining credit union elective courses in the Management Studies Program (CU00-300 series) that you did not take to complete the Program.

If you have the CUIC Associate designation only, you need 5 more courses to meet Lakeland's requirements for entry into the degree program. To meet these requirements, you need to complete the remaining three electives in the MSP (as above) plus CUIC120 *Communications* and CU00-185 *Credit Union Products and Services*.

For any of the courses mentioned above, CUIC graduates may be able to transfer credit for business courses taken from Canadian colleges, universities or other professional institutes. Therefore, submit all of your official transcripts to Lakeland College (Alberta) for its review.

With your CUIC designation(s) plus the additional courses, Lakeland College deems employees to have the equivalent of its two-year Business Administration Diploma, a pre-requisite for entry into the Applied Financial Services Degree Program. For information on the Diploma program, visit <http://www.lakelandc.ab.ca/calendar/AY0506/BusAdmn.html>.

For information on the degree program, go to: <http://www.lakelandc.ab.ca/calendar/AY0506/BAFS.html>

If you have your CFP designation or are taking courses towards it and/or if you have completed the Canadian Securities Course or mutual funds course be sure to include transcripts for those studies. These, too, will count toward the degree program.

Management Development Certificate

By completing a Business Law and a Business/Financial Math courses, CUIC Fellows will meet all of the course requirements for Lakeland's Management Development Certificate. Based on work experience, Lakeland may



consider giving some employees credit for the business/financial math course. For more information, go to: <http://www.lakelandc.ab.ca/calendar/AY0506/ManagementDevelopment.html>

You do not need to live in Alberta to apply for admission into the Management Development Certificate, Business Administration Diploma or the Bachelor in Applied Financial Services. Start the process right here: <http://www.lakelandc.ab.ca/application/howtoapply.html>. Complete the Admission form; pay the \$40 fee then send your CUIC/CUSOURCE transcript, along with other official post-secondary transcripts to Office of the Registrar, Lakeland College, 5707-47th Avenue West, Vermillion, AB T9X 1K5.

CUSOURCE – Leveraging your CUIC Designations

CUIC Reminders

Certificate/Designation Fee

The former \$100 CUIC Admission fee is now a Certificate/Designation Fee that is paid upon registration in a CUIC certificate/designation program.

The Certificate/Designation fee applies to the lending accreditation programs, the Sales & Service Rep. Accreditation Program (Branch and Call Centre), the GSP, MSP, and any future CUSOURCE programs. Students who were admitted to CUIC do not have to repay the Certificate/Designation fee relative to the GSP and MSP.

Credit Transfers

Employees need to enroll in the GSP or MSP and pay the \$100 Certificate/Designation fee prior to submitting their transcripts to CUSOURCE to evaluate for credit transfer purposes e.g., the CUIC-100 level courses in the GSP and MSP.

This newsletter is for everyone!

Please post it on your staffroom notice board or circulate it among the rest of your colleagues.

in touch is published to inform you about CUSOURCE and its designation arm, CUIC. If you have suggestions for articles, or would like to contribute information, please direct your comments to:

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E-mail: ellisj@cusource.ca

www.cusource.ca

CUSOURCE National Calendar

Date: Aug. 26
Event: Optional Assignment Session starts in advance of CUIC November exams.
Enroll by: Aug. 14

Date: Aug. 22 – Dec. 7
Event: Online Cohorts start for CU01-210 web and CU00-345 lending courses
Enroll by: Aug. 12

Date: Sept. 15 – Oct. 27
Event: Supervisor Preparation for Sales & Service Rep.
Accreditation: Branch & Call Centre
Enroll by: Sept. 5

Date: Nov. 23
Event: Exams for all CUIC courses
Enroll by: Oct. 7

National CUSOURCE Webcasts – Every Thursday

Start time: Noon EDT

Duration: approximately 1.5 hours

Who can participate: Anyone with an interest in the topic being presented.

For upcoming webcasts or to enroll: Go to *New Learning* in the CUSOURCE Catalogue. Click on CL-INFO CUSOURCE Web Casts

CUSOURCE Regional Offices

British Columbia

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