



## Certificate Worksheet

# CFT Upper Midwest Credit Analysis Certificate

*The CFT Customer Service Certificate curriculum provides students with both general knowledge and specific competencies that establish a foundation for a successful financial services career.*

**NAME:** \_\_\_\_\_ **Last Four Digits of SS#:** \_\_\_\_\_

**ORGANIZATION:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**CITY:** \_\_\_\_\_ **STATE:** \_\_\_\_\_ **ZIP:** \_\_\_\_\_

**PHONE:** \_\_\_\_\_ **FAX:** \_\_\_\_\_

**EMAIL:** \_\_\_\_\_

REQUIRED COURSES	Credits	Date	Grade
Analyzing Financial Statements			
Business Writing			
Commercial Loan Documentation			
Commercial Lending			
Personal Tax Return Analysis			
Statement Analysis – Case Studies			
Elective			
Elective			
<b>Total Credits</b>			

### DIPLOMA REQUIREMENTS AND ELIGIBILITY

The student is eligible for the diploma when the following requirements have been met:

- Successfully complete 12 credits
- Required courses are completed with a passing grade
- Grade Point average is at least a “C”
- All electives must be Business, Financial Services or Computer Courses
- Up to half of the course credits needed for this diploma can be transferred from a college or university or by local credit review. All transfer courses must directly relate to the study of finance and financial services.

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