



## Certificate Worksheet

# CFT Upper Midwest Customer Service 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 |
|------------------------------|---------|------|-------|
| Principles of Banking        |         |      |       |
| Law & Banking: Applications* |         |      |       |
| Customer Service             |         |      |       |
| Written Communication*       |         |      |       |
| Elective                     |         |      |       |
| Elective                     |         |      |       |
| <b>Total Credits</b>         |         |      |       |

\*Prerequisite course required. See the Course Description at [www.cftum.org](http://www.cftum.org) for details. Electives: 2 courses required – choose from any CFT courses not already listed above.

### 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.