

# 2023 Financial Counselor Training & Certification Program

**Earn your Certified Credit Union Financial Counselor (CCUFC) designation through the Financial Counseling Certification Program (FiCEP).**

The Southeastern Credit Union Foundation (SECUF) has partnered with CUNA and CU Difference to offer an exceptional financial counseling training program for credit union staff and volunteers. The program, called the Enhanced Financial Counseling Certification Program (FiCEP), combines self-study with instructor-led webinars and networking opportunities. Thanks to the generous support of our donors and sponsors, we can offer this enhanced FiCEP program at a lower cost.

Individuals who successfully complete the program and exam will earn their Certified Credit Union Financial Counselor (CCUFC) designation. This certification demonstrates proficiency in critical financial counseling skills and concepts, empowering participants to provide superior service to credit union members and guide them towards greater financial stability.

“ The FiCEP program is truly helping credit union professionals reach their members and improve their members’ financial futures. This is a great partnership between CUNA and Leagues that continues to touch members across the country and prepare them for whatever stage of life they are in. ”

**-Bobbi Grady, Director of the Southeastern Credit Union Foundation**

## CUNA Financial Counseling Certification Program

FiCEP enables all credit union staff and volunteers to become more confident in helping members build stronger financial futures. FiCEP is designed for credit union staff members who work in the financial counseling, collections and loan departments, or any others who are committed to helping members gain control of their finances. Modeled after the CUNA Certified Financial Counselor Schools, FiCEP includes 33 chapters of learning within one workbook, culminating in one final exam. Credit unions with certified financial counselors on staff are better able to demonstrate the credit union difference, grow product and service revenue, and attract new members.

### Curriculum, Training, and Support

- Live Orientation Webinar
- Live Weekly Educational Webinars and Recordings for Review
- Pre-recorded Review Webinar
- Live Exam Prep Webinar
- 261 Practice Quiz Questions
- Free PDF Version of the 5th Edition FiCEP book  
*(ADDITIONAL CHARGE IF PRINTED BOOKS ARE REQUESTED)*
- Proctored Exam (Held Virtually)
- Financial Counselor Development Webinar
- Access to an Online FiCEP Community: Through this community current students as well as those already certified can connect, ask questions, share tips, and ideas as well as upload documents to contribute to the growing library of resource materials.
- Invitations to Free Quarterly Facilitated Online Peer Networking and Educational Meetings.



Southeastern  
Credit Union Foundation  
Charity. Community. Cooperation.

# Educational Investment

Your credit union's educational investment is a maximum of \$799 per participant for affiliated credit unions, depending upon the number registered. Thanks to the generous support of our donors and sponsors, we can offer this enhanced FiCEP program at a lower cost. Credit unions with assets under \$100 million can use their SAS initiatives account. Professional Development Grants may be available.



- Register 1-5 participants: \$799 per person/\$999 per non-member
- Register 6-10 participants: \$699 per person/\$899 per non-member
- Register 10+ participants: \$649 per person/\$849 per non-member

Your credit union can expect a time investment of on average for each student to spend approximately 30 minutes reading each chapter, 60 minutes participating in weekly webinars and additional time to take practice quizzes and prepare for the examination. To receive the designation of CCUFC, Certified Credit Union Financial Counselor, students must take and pass a 100-question proctored exam that may take up to two hours.

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## Recertification

If you earned your Certified Financial Counselor designation three or more years ago, you are encouraged to complete continuing education to keep your certification. To recertify, CUNA has the following two options available:

**Register to attend CUNA's eSchool, either live or recorded;** or **Self-study by purchasing the latest book (pdf or printed).** Books can be purchased through the SECUF at \$399 and include:

- PDF copy of the CUNA Financial Counseling Certification Program Update Book, 5th Edition
- Access to an Online FiCEP Community: Through this community current students as well as those already certified can connect, ask questions, share tips, and ideas as well as upload documents to contribute to the growing library of resource materials.
- Invitation to a Financial Counselor Development Webinar
- Invitations to Free Quarterly Facilitated Online Peer Networking and Educational Meetings.

## 2023 FiCEP Timeline

Registration Deadline: May 5, 2023

Orientation Webinar: May 25, 2023

Live Education Webinars: June 1 – September 7, 2023

*(Every Other Thursday 3-4pm EST)*

Virtual Exam Date: September 21, 2023, 10am-12pm EST

Virtual Make-Up Exam Date: September 28, 2023, 10am-12pm EST

Financial Counselor Development Webinar: TBD

### Participate/Learn More

Credit unions interested in having staff trained to become financial counselors should contact SECUF staff at [secuf@lscu.coop](mailto:secuf@lscu.coop). or register online at [www.lscu.coop/foundation/ficep.php](http://www.lscu.coop/foundation/ficep.php).