

2020

Financial Counselor Training & Certification Program

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

The League of Southeastern Credit Unions (LSCU) and the Southeastern Credit Union Foundation (SECUF) are pleased to partner with the Louisiana Credit Union League to offer this unique financial counseling training program for credit union staff, which combines the affordability and convenience of a self-study program with the group hands-on learning and networking of an off-site CUNA School.

Participants will have access to a portal within the LSCU website housing all materials, webinars and study guides to help them stay on track. They will also receive regular communication with the FiCEP coordinator and be invited to join a social media group where they may ask questions at any time. In-person group training sessions will provide hands-on training with experienced counselors, as well as the opportunity to network, share best practices, and prepare for exams. Participants will be able to test as a group or individually if necessary. Special training and coaching will be provided to help each participant develop a detailed vision and plan for financial counseling at their credit union.

Individuals who successfully complete the program and exams will earn their Certified Credit Union Financial Counselor (CCUFC) designation.

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

~ Juli Lewis
Director, Southeastern Credit Union Foundation

CUNA Financial Counseling Certification Program

FiCEP enables all credit union staff to become more confident in helping members build a stronger financial future. 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 financial futures. Modeled after the CUNA Certified Financial Counselor Schools, FiCEP includes two parts of four learning modules each. When participants successfully complete the proctored exams for both parts (eight total modules), they become a CCUFC ready and able to better understand each member’s unique situation and assist credit union members in reaching their financial goals.

Program Participation Benefits

- Proven financial counseling skills that become part of the credit union’s culture
- Written for all staff so anyone can offer financial counseling during every member interaction
- Certification that satisfies members’ needs as they continually look for the value of a credit union
- Differentiates a credit union by having certified financial counselors on its team
- Helps members transform the way they deal with money through real-world counseling



Southeastern
Credit Union Foundation
Charity. Community. Cooperation.

Educational Investment

Your credit union's educational investment is a maximum of \$650 per participant, depending on the number registered. Credit unions under \$50 million can use their \$500 initiatives account.

What's Included

Ten webinars, books (physical or pdf) and exams (8 modules), and two in-person workshops. LSCU will order all materials and distribute to participants. If a participant cannot attend the in-person testing, a proctor will be arranged.

Participate/Learn More

The deadline to register is January 31, 2020 for Session 1 or June 30, 2020 for session 2. Credit unions interested in having staff trained to become financial counselors should contact SECUF Director, Juli Lewis at juli.lewis@lscu.coop or 850-321-5199.

Learning Modules

FiCEP Part I, Modules 1-4

- Introduction to Financial Counseling *Module 1*
 - A look into debt problems, who has them and attitudes you may encounter
 - Examining member needs and determining the right type of financial counseling
- Financial Counseling Essentials *Module 2*
 - Understanding the role of the financial counselor
 - Collecting and analyzing the data
- Special Issues in Financial Counseling *Module 3*
 - Understanding credit and ways to establish/repair credit
 - Member rights when dealing with creditors
 - Connecting members to community resources
- Using Communication Skills During Financial Counseling *Module 4*
 - Understanding your unique member
 - Skills and techniques for the counseling process

FiCEP Part II, Modules 1-4

- Taxes, Insurance, and Investments *Module 5*
 - Tax basics and understanding insurance needs
- Controlling Living Expenses *Module 6*
 - Options to manage daily expenses such as housing and transportation
 - Types of employment and how income is impacted
- Money, Attitudes & Behaviors *Module 7*
 - Going deeper to understand the reasons behind the habits
- Retirement & Personal Financial Preparedness *Module 8*
 - Understanding retirement needs and establishing a plan
 - Exploring identity theft and various types of fraud

2020 FiCEP Timeline

February 2020	Spring Session Orientation
April 2020	Part I Testing
June 2020	Part II Testing/Workshop
July 2020	Fall Session Orientation
September 2020	Part I Testing
November 2020	Part II Testing/Workshop