INITIATING WEALTH DISCUSSIONS

CCUA Canadian Credit Union Association | cusource Professional Development and Education

Building wealth knowledge and front-line confidence during financial discussions with members is a critical first step to increasing the number of wealth related products each member has with their credit union. *Cusource® Education* offers a wide range of wealth focused professional development options. There is something for every knowledge level and delivery preference.

Foundational Knowledge

#beyondtransactional

A 6-part podcast series that challenges front line staff to go #beyondtransactional with their member conversations. These short, impactful sessions cover financial topics such as insurance, budgeting, taxes and more.

Learners said:

> *"Love the podcast delivery method - all the templates and tools allow for a learning plan on the job."*

Spotting Quality Referrals

A 60-minute, credit union based eLearning course introducing core concepts of financial planning. Learners spot opportunities to assist members and grow share of wallet in a variety of wealth-based financial.

Learners said:

> *"Very informative, this would be a good learning tool to new employees entering into the financial industry for the first time".*

Applying Your Skills

NEW! Wealth Scenarios and Conversation Starters

A video-based eLearning course designed to increase learner confidence. Key concepts include: the 6 steps of an effective conversation, the importance of proper pre-meeting member file review, and more.

Applied Financial Guidance

A case-study based facilitated eClass building on foundational concepts to provide learners with the knowledge and confidence to address their member's need for personal financial guidance while reinforcing when to provide information versus providing a referral to a licensed professional.

Academic Level Learning

CUIC 240 Fundamentals of Personal Financial Planning

A 10-module course for employees wanting increased confidence talking with members about their entire portfolio of financial products. Learn to make solid referrals to qualified financial planners. This is a university-level course that includes an end of course examination.

Certification level learning: Certified Executor Advisor (CEA) Designation Program

The (CEA) curriculum is designed to provide professionals with the skills to assist Canadians with delegation and undertakings for executor/executrix roles. Upon completion, learners will be well-versed in: the duties of an executor, management and liquidation of property and other assets, financial issues, pertinent tax matters, practical knowledge of trusts, and challenges of estate administration.

For more information about Financial Conversation Confidence modules, please contact Client Solutions at **1.888.367.1386, clientsolutions@ccua.com** or visit **ccua.com**