

Here's a quick and easy reference to help you match your learning needs with our **CUIC®** courses. Take them as stand-alone courses or as credits towards a **CUIC** designation or accreditation, along with other **Cusource®** courses.

Course Title →	Products and Services	Credit Unions: Different by Design*	Consumer and Residential Mortgage Lending	Financial Management	Fundamentals of Personal Financial Planning	Strategic Management	Human Resources Management	Commercial Real Estate Lending	Business Lending	Agricultural Lending
Course Codes* →	CUC-185-PRSRE07-SLS CUC-185-PRSRE07-CHR	CUC-201-CRDDE01-SLS CUC-201-CRDDE01-CHR	CUC-210-CRMLE12-SLS CUC-210-CRMLE12-CHR	CUC-225-FNMNE03-SLS CUC-225-FNMNE03-CHR	CUC-240-PPFPE11-SLS CUC-240-PPFPE11-CHR	CUC-315-SMCUE01-CHR	CUC-325-HMRME04-SLS	CUC-350-CRELE01-SLS CUC-350-CRELE01-CHR	CUC-345-BSLNE02-SLS CUC-345-BSLNE02-CHR	CUC-346-AGLNE06-SLS
Module 1	Saving Services	Credit Unions: Our Roots. Our Story	Introduction to Consumer Lending	Overview of Financial Management in Credit Unions	The Financial Planning Process	Strategic Management: An Overview	HR Management: A Strategic Perspective	Commercial Real Estate Lending Overview	Introduction to Business Lending	Introduction to Agricultural Lending
Module 2	Registered Plans	A System Built on Collaboration and Connection	Loan Application Process	Interpreting Financial Success Using Financial Statements, Ratio and Trend Analysis	Net Worth, Cash Flow and Debt Management	Analyzing the External Environment of the Firm	HR Planning Process	Financing Commercial Real Estate	Financial Statements	Farm Product Marketing
Module 3	Lending Services	You're Part of Something Big	The Credit Decision	Financial Structure and Asset Management	Risk Management and the Role of Insurance	Analyzing the Internal Environment of the Firm	Employment Equity and Diversity Management	Beginning the Loan Investigation	Cash Flow	Risk Characteristics
Module 4	Card and Payment Services	Financial Services: The Playing Field and the Players	Loan Documentation, Monitoring Collections and Financial Guidance	Time Value of Money Considerations	The Financial Marketplace and Investment Products	Recognizing a Firm's Intellectual Assets	Organizational Culture	Appraisal and Evaluation	The Loan Investigation Process	Agricultural Lending in Credit Unions
Module 5	Transaction Services	Playing by the Rules	Mortgage Law and Mortgage Insurers	Macro-economic Considerations	Investment Planning	Business Level Strategy	Organizational Staffing	Analyzing the Credit Application	Security	The Loan Application Process
Module 6	Investment Services	Financial Statements: Our Story in Numbers	Processing The Mortgage Loan Application	Risk Management Considerations	The Income Tax System	Corporate Level Strategy	Training and Development	Special-Purpose Financing	Structuring the Loan	Financial Analysis
Module 7	Estate Planning	Building Capacity, Strength and Resilience	Mortgage Loan Administration	Asset/Liability Management (ALM)	Tax Planning	Disruptive Environments and Digital Business Strategy	Compensation	Disbursements, Documentation and Monitoring	Loan Disbursements and Monitoring	Whole Farm Analysis
Module 8	Insurance Services	Preparing for the Future	Discharge and Prepayment Procedures	Capital Adequacy and Deposit Protection	Retirement Planning	Strategy Control and Corporate Governance	Supporting Employee Health and Well-Being	Problem Accounts	Problem Accounts	Collateral Appraisal and Evaluation
Module 9	Financial Planning Services		Member Contact Skills	Operations Management	Estate Planning	Creating Effective Organizational Designs	Employee and Employer Rights and Responsibilities		Prospecting for Business Loans	Security, Legal Issues and Disbursements Plans
Module 10	Other Services, Packages and Programs		Consumer Lending Business Development	Financial Reporting	The Comprehensive Financial Plan	Strategic Leadership and Innovation and Growth	Labour Relations		Negotiation and Closing	Monitoring and Collections

*Course codes ending in SLS indicate self-study options and codes ending in CHR indicate [cohort](#) options.

*CUC-201: Credit Unions: Different by Design will replace CUC-200 The Credit Union System course in our program requirements

Questions? Client Solutions is happy to help. clientsolutions@ccua.com or 1.888.367.1386

