

# FSR DEVELOPMENT PROGRAM

The FSR Development program is a three-tiered training program designed specifically for Financial Service Representatives working in the credit union system. The program has been designed to provide the foundational, applied and advanced skills needed in the role.

Currently in development, the program is being released in stages, and upon completion will lead to an FSR accreditation in partnership with Dalhousie University.

## Tier One: Foundational Skills

New courses developed in partnership with Westoba Credit Union, Steinbach Credit Union, Access Credit Union and Assiniboine Credit Union

Tier one of the FSR Development program covers everything an FSR needs to know in their first three to nine months on the job. **Curriculum includes:**

### Product and Service Knowledge Assessment

### Spotting Quality Referrals

### Core Credit Knowledge

#### FSR Start Series - Offering 6 modules

- Reading and Interpreting Credit Reports
- Know your Member, Manage your Risk
- Your Role in Asset Liability Management
- Trusts, Power of Attorney and other Conversations
- Loan and Investment Strategies in Action
- Reading and Interpreting Financial Statements

## Now Available!

New courses developed in partnership with Westoba Credit Union, Union, Access Credit Union and Assiniboine Credit Union

The next two tiers focus on developing the applied and advanced skills of FSRs after their second year on the job. **New curriculum includes:**

### NEW CLASSES

Applied Financial Guidance

Working with Multi-Purpose/Collateral Mortgages

Advanced RRSP Strategies

Dealing with Advanced RRIF Accounts

### NEW ELEARNING (ON-DEMAND MODULES)

#### Advanced Personal Lending:

Managing the Chronic Credit Seeker

Managing High-Income, High-Net-Worth Members

Recommending Insured Mortgages with Improvements

**Advanced Investment Guidance** (3 eLearning modules covering topics: Dealing with Pensions, Time Value of Money and the Mutual Fund Industry) **Coming fall 2017**



## Coming in 2018!

Certification and accreditation options will become available in 2018. Watch for full details and curriculum requirements for all three tiers, coming soon.