2020 TRAINING GUIDE

INSIDE
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2020 Live Events Calendar

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LOOKING FOR A WAY TO DRIVE HIGH-VALUE DEPOSITS?

Turn to the nation’s leading provider of reciprocal deposit services.

Want to build more customer relationships in the face of growing deposit competition? Turn to the nation’s leading reciprocal deposit services: ICS®, or Insured Cash Sweep®, and CDARS®. Offer customers access to FDIC insurance beyond $250,000 on funds placed into demand deposit accounts and money market deposit accounts (using ICS) and into CDs (using CDARS), and:

- Offer a differentiated service—access to higher levels of FDIC insurance than any bank, even the nation’s largest, can offer on its own
- Add local relationship-based funding that increases franchise value
- Attract deposits in larger increments
- Replace more expensive funding, like routinely collateralized deposits and those from listing services
- Repurpose funds invested in collateral into higher-earning assets

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Use of the ICS and CDARS services is subject to the terms, conditions, and disclosures set forth in the CDARS-ICS Participating Institution Agreement and applicable Deposit Placement Agreements. Limits apply, and customer eligibility criteria may apply. ICS program withdrawals are limited to six per month when using the ICS savings option. ICS, Insured Cash Sweep, and CDARS are registered service marks of Promontory Interfinancial Network, LLC.
TRAINING TIPS FOR TODAY AND TOMORROW

With nearly 200 years of combined industry experience, the Community Banker University team is well versed in the ins and outs of community banker continuing education. In a recent planning meeting, I challenged the team to come up with recommendations that can help foster a culture of learning and innovation. Here are five tips that resulted from our discussion:

1. **Senior management must actively support and model the behavior they want to see.** Encourage curiosity and challenge staff to get outside of their comfort zones. If you want team members who are not afraid to question the status quo, they must feel supported and safe doing so. If you aim to create an environment that prizes disruption and innovation, this is especially important.

2. **All learning efforts should support strategic priorities, and those priorities should be clearly communicated to staff and reinforced by human resources and middle management.** Employees must understand how filling knowledge gaps will contribute to both their own success and the success of the enterprise.

3. **Link learning and performance so that employees see that your organization values ongoing professional development.** The expectation that employees should always strive to improve and develop should be clear and, ideally, supported through incentives.

4. **It’s OK to make employees responsible for their own learning, but it is necessary to clearly define what opportunities, tools, and resources are available to them.**

5. **We hear a lot about succession plans for the C-suite, but do you have a strategy to harvest legacy knowledge from key employees so it can be shared across the organization?** With a large percentage of the population set to retire in the next 10 years, employers should create a strategic plan to ensure need-to-know information is passed to the next generation of employees.

As 2019 wanes, the new year — and the new decade — offers an excellent opportunity to examine how you can best create a forward-focused culture that embraces learning and change. By following these five tips, you can make knowledge transfer and skills acquisition a daily part of the job—and set your community bank and its employees up for long-term success.

Sincerely,

Lindsay LaNore
Group Executive Vice President, Community Banker University

CONTENTS

<table>
<thead>
<tr>
<th>Page</th>
<th>CONTENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>PROFESSIONAL CERTIFICATIONS</td>
</tr>
<tr>
<td>5</td>
<td>2020 CALENDAR OF EVENTS</td>
</tr>
<tr>
<td>6</td>
<td>LIVE EVENTS</td>
</tr>
<tr>
<td>7</td>
<td>February, March</td>
</tr>
<tr>
<td>8</td>
<td>April</td>
</tr>
<tr>
<td>9</td>
<td>May</td>
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<td>9</td>
<td>June</td>
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<td>August</td>
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<td>12</td>
<td>September</td>
</tr>
<tr>
<td>12</td>
<td>October</td>
</tr>
<tr>
<td>13</td>
<td>November</td>
</tr>
<tr>
<td>14</td>
<td>ONLINE TRAINING</td>
</tr>
<tr>
<td>16</td>
<td>ONLINE CERTIFICATE PROGRAMS</td>
</tr>
<tr>
<td>18</td>
<td>UNLIMITED WEBINAR PASS</td>
</tr>
<tr>
<td>19</td>
<td>RESOURCES AND TOOLS</td>
</tr>
<tr>
<td>20</td>
<td>BANK DIRECTOR PROGRAM</td>
</tr>
<tr>
<td>21</td>
<td>BANK DIRECTOR RESOURCES</td>
</tr>
<tr>
<td>22</td>
<td>COMMUNITY BANKER UNIVERSITY TEAM</td>
</tr>
</tbody>
</table>
Certifications make a powerful statement about the expertise that you bring to the table and demonstrate to your bank, its customers, and the regulators that you possess the skills and knowledge to manage key operational areas of a financial institution.

ICBA Community Banker University offers nine certification programs. Our certification programs are nationally recognized professional designations and require the user to follow specific processes and procedures before a certification is granted. ICBA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE sponsors.

SHARE YOUR CERTIFICATION SUCCESS!

Community Banker University is thrilled to announce that we can now award digital badges to community bankers who have successfully completed an ICBA certification program.

What is a digital badge? Digital badges are a digital representation of certification credentials. The badges contain metadata that describe your qualifications and credentials, including how you earned them. You can display the badge in your email signature, electronic copies of your resume, and on social media sites such as LinkedIn, Facebook, and Twitter. These digital credentials cannot be falsified.
## 2020 CALANDAR OF EVENTS

Dates and locations subject to change.

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<tr>
<th>FEBRUARY</th>
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<tbody>
<tr>
<td>23-28:</td>
<td>8-12: ICBA LIVE® (Orlando, FL)</td>
<td>2-3: Fraud Seminar (San Antonio, TX)</td>
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<td>Compliance</td>
<td>29-April 1: Credit Analyst Institute (San</td>
<td>26-May 1: Audit Institute (Charlotte, NC)</td>
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<td>Institute™</td>
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<td>27-28: Loan Review Seminar (Minneapolis, MN)</td>
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<td>4-9: Compliance Institute™ (Denver, CO)</td>
<td>28-29: Advanced Loan Review Seminar</td>
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<td>12-13: IT Institute™ (Minneapolis, MN)</td>
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<td>13-14: Call Report Preparation Seminar</td>
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<td>12-13: Vendor Management Seminar (Minneapolis, MN)</td>
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<td>17-18: CFO Forum (Minneapolis, MN)</td>
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<td>19-20: Community Bank Human Resources</td>
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<td>3-7: IT Institute™ (Minneapolis, MN)</td>
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<td>10-11: Advanced IT Strategies (Minneapolis, MN)</td>
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<td>13-16: Consumer Lending Institute™ (Minneapolis, MN)</td>
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<td>21-24: Annual Current Issues Certification</td>
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<td>13-16: Risk Management Institute™ (Minneapolis, MN)</td>
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<td>5-6: Trust Department Seminar (Minneapolis, MN)</td>
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The Community Bank Marketing Seminar will be offered in 2020 at a yet-to-be announced date and location.
FEBRUARY

COMPLIANCE INSTITUTE℠

Feb. 23-28 | Dallas, TX

The ICBA Compliance Institute is a fast-paced learning environment that features a detailed study of the relevant areas of regulatory compliance with a focus on key concepts that spell success in the examination context. Each regulation is approached in terms of the requirements, best practice internal controls, and audit objectives. Learning is reinforced with many sample disclosures, applicability charts, and illustrative quizzes and exercises.

Earn your Certified Community Bank Compliance Officer (CCBCO) designation

42 CPE credits

ICBA MEMBER: $2,395; TESTING FEE NOT INCLUDED

Additional Dates and Locations: June 14-19 | Minneapolis, MN, and Oct. 4-9 | Denver, CO

MARCH

CREDIT ANALYST INSTITUTE℠

March 29-April 1 | San Antonio, TX

Review the evolving role of the credit analyst and discuss critical functions including financial analysis, overall business risk, legal liability, and customer relationship needs. Learn to better identify key strengths and weaknesses of a credit request and stay ahead of potential compliance exposures in a credit portfolio.

Earn your Certified Community Bank Credit Analyst (CCBCA) designation

28 CPE credits

ICBA MEMBER: $1,395; TESTING FEE NOT INCLUDED

Additional Dates and Locations: Oct. 4-7 | Minneapolis, MN
FRAUD SEMINAR
April 2-3 | San Antonio, TX
According to the Association of Certified Fraud Examiners (ACFE), businesses lose 5 percent of gross profit annually due to fraud. In nearly half of these cases, ACFE reports that the fraud could have been prevented had the business enacted stronger internal controls. In this fast-paced, dynamic session, participants learn how to identify fraud and protect bank assets. This program includes break-out sessions with interactive group discussion.
12 CPE credits
ICBA MEMBER: $595 BEFORE MARCH 2/$695 AFTER MARCH 2

AUDIT INSTITUTE®
April 26-May 1 | Charlotte, NC
Accelerated from two weeks to one week, the ICBA Audit Institute minimizes time away from the bank and deepens employees’ understanding of the audit function. Unique to this institute is a pre-recorded session that is digitally delivered to attendees prior to the event.

Earn your Certified Community Bank Internal Auditor (CCBIA) designation
49 CPE credits
ICBA MEMBER: $3,295; TESTING FEE NOT INCLUDED
Additional Dates and Locations: Sept. 13-18 | Minneapolis, MN

LOAN REVIEW SEMINAR
April 27-28 | Minneapolis, MN
The loan review process is critical to the success of any community bank. This process must be structured and requires policies and procedures to ensure timely identification of problem credits, asset quality, and accuracy. The process must also include well-defined classification guidelines to ensure consistent loan ratings and the accounting for the allowance for loan and lease losses must comply with generally accepted accounting principles.
12 CPE credits
ICBA MEMBER: $595 BEFORE MARCH 27/$695 AFTER MARCH 27

ADVANCED LOAN REVIEW SEMINAR NEW!
April 28-29 | Minneapolis, MN
Community Banker University is very excited to add this new seminar to our 2020 programming. More information will be coming soon.
12 CPE credits
ICBA MEMBER: $595 BEFORE MARCH 28/$695 AFTER MARCH 28
BSA/AML INSTITUTE™
May 4-6 | Minneapolis, MN

Identify emerging areas of customer, product, and geographic risk, such as banking marijuana-related businesses, and their potential effects on your bank’s BSA/AML program. Examine the Customer Due Diligence (CDD) rule requirements on collection and verification of beneficial owner information and learn how the CDD rule amended the existing Anti-Money Laundering Program (AML program) requirements. Learn how other banks are meeting the financial recordkeeping, internal monitoring, and SAR reporting challenges of BSA/AML compliance.

Earn your BSA/AML Professional (CBAP) designation
20 CPE credits

ICBA MEMBER: $1,295; TESTING FEE NOT INCLUDED
Additional Dates and Locations: Aug. 10-12 | Denver, CO, and Nov. 4-6 | Charlotte, NC

CALL REPORT SEMINAR
May 12-13 | Minneapolis, MN

With an ever-changing regulatory and accounting environment, call report preparers and reviewers must remain up to date. This seminar offers a detailed discussion of each call report schedule as well as the real-life challenges of completing an accurate call report. Review line-item details of the call report with an emphasis on areas most pertinent to community banks.

12 CPE credits

ICBA MEMBER: $595 BEFORE APRIL 13/$695 AFTER APRIL 13

ADVANCED CALL REPORT SEMINAR
May 13-14 | Minneapolis, MN

As the complexity of the call report and Federal Reserve reports continue to increase, even experienced bankers often have questions about the nuances of these filings. Take a deep dive into the more complex areas of the call report.

12 CPE credits

ICBA MEMBER: $595 BEFORE APRIL 13/$695 AFTER APRIL 13
COMMUNITY BANK MERGERS & ACQUISITIONS WORKSHOP

June 15-16 | Minneapolis, MN

For banks considering initiating a purchase or sale, there are several strategic considerations that must be weighed. This hands-on workshop explores all aspects of a community bank acquisition transaction from both a buyer’s and seller’s perspective and includes lecture, interactive discussion, real-life examples, an exercise where learners work through financial models, as well as a sample acquisition.

10 CPE credits

ICBA MEMBER: $695 BEFORE MAY 15/$795 AFTER MAY 15

AUGUST

IT INSTITUTE℠

Aug. 3-7 | Minneapolis, MN

Information technology solutions continue to evolve, creating opportunities for community banks to increase efficiency, improve service capabilities, and better safeguard customers. Community Banker University’s IT Institute offers timely solutions to strengthen IT security capabilities, develop operational efficiencies, create business continuity solutions, and enhance social marketing capabilities.

39 CPE credits

ICBA MEMBER: $2,395; TESTING FEE NOT INCLUDED

ADVANCED IT STRATEGIES SEMINAR

Aug. 10-11 | Minneapolis, MN

To succeed in today’s fast-paced environment, financial institutions need to constantly evolve. With the advancement of regulations, technology, and the change it drives, technology professionals must know how to dive deeper into data security frameworks and learn how to turn data into actionable information.

16 CPE credits

ICBA MEMBER: $595 BEFORE JULY 10/$695 AFTER JULY 10
VENDOR MANAGEMENT SEMINAR
Aug. 12-13 | Minneapolis, MN

In a financial environment wrought with strong enforcement actions, rising regulatory expectations, and massive data breaches, community banks must understand and manage a secure network of relationships to ensure customer data, bank transactions, business activity, and shareholders are protected. This seminar assists community banks in navigating the critical considerations needed to effectively implement a sound vendor management program. This program highlights key efforts to ensure prudent risk management, while achieving bottom-line results.

12 CPE credits

ICBA MEMBER: $595 BEFORE JULY 12/$695 AFTER JULY 12

CFO FORUM
Aug. 17-18 | Minneapolis, MN

Many high-performing banks have initiated a fundamental shift in the CFO role, making the CFO a critical strategic business partner across the financial institution. Such evolution has encouraged the transformation of the CFO from solely traditional tax functions to now include analysis of big data, technology systems, and efficiency strategies. This CFO Forum tackles the top issues facing CFOs today, including emerging tax and accounting strategies, CECL preparation, bank and core deposit valuation, enterprise risk, and more. Build your CFO network with plenty of networking opportunities during the event.

13 CPE credits

ICBA MEMBER: $695 BEFORE JULY 17/$795 AFTER JULY 17

COMMUNITY BANK HUMAN RESOURCES SEMINAR
Aug. 19-20 | Minneapolis, MN

Today’s modern workplace is transforming the role of the community bank human resources (HR) professional. People management and responsible administration is key for all HR professionals. However, finding reliable and timely information to help your bank navigate complex employment situations can be challenging. Leave with practical advice, guidance, and key strategies to ensure effective and compliant management of employee and employer requirements.

16 CPE credits

ICBA MEMBER: $595 BEFORE JULY 20/$695 AFTER JULY 20
COMMERCIAL LENDING INSTITUTE℠
Aug. 23-28 | St. Louis, MO
Manage and grow your commercial loan portfolio while navigating the current economy, regulatory changes, and customer demands. Develop your understanding of credit and ratio analysis methods, including break-even analysis, sustainable growth rate calculation, and more.

Earn your Certified Commercial Loan Officer (CCLO) designation
47 CPE credits

ICBA MEMBER: $1,995; TESTING FEE NOT INCLUDED

SEPTEMBER

INFORMATION SYSTEMS AUDITING WORKSHOP
Sept. 10-11 | Minneapolis, MN
Join information security specialists as they explore ways to help your organization avoid being victimized by cyber criminals. Attendees receive a laptop to use during training that is loaded with a variety of common, easy-to-use auditing and security assessment tools. Learn to identify weak or default configuration settings and provide recommendations for strengthening security, audit, and monitoring settings.

14 CPE credits

ICBA MEMBER: $595 BEFORE AUG. 10/$695 AFTER AUG. 10

CONSUMER LENDING INSTITUTE℠
Sept. 13-16 | Minneapolis, MN
Make informed credit decisions by developing your ability to evaluate a consumer loan request. This program covers the application process, financial statement analysis, credit analysis, loan structure, compliance, documentation procedures, and closing.

Earn your Certified Community Bank Consumer Lender (CCBCL) designation
27 CPE credits

ICBA MEMBER: $1,295; TESTING FEE NOT INCLUDED
ANNUAL CURRENT ISSUES CERTIFICATION CONFERENCE
Sept. 21-24 | Minneapolis, MN

Designed for participants of ICBA’s Auditing, Compliance, Bank Security, IT, and BSA/AML certification programs—as well as other interested bankers—this four-day conference addresses critical issues community bankers are facing today. Join us for one or all four days as we cover the industry’s hottest audit, operations, compliance, and security topics.

DAY 1: Auditing
DAY 2: Lending & Deposit Compliance
DAY 3: BSA/AML
DAY 4: Fraud & Physical Security

8 CPE credits per day

ICBA MEMBER: ONE-DAY: $395; TWO-DAY: $695; THREE-DAY: $995; FOUR-DAY: $1,345

Additional Dates and Locations: Oct. 19-22 | San Antonio, TX

BANK SECURITY INSTITUTE℠
Sept. 27-30 | Minneapolis, MN

The ICBA Bank Security Institute provides an in-depth training program that is specifically developed for the professional security officer who works for a community bank, regardless of the geographical location or size of the bank. This program addresses policies, procedures, and practices so that the security officer is equipped to identify security threats and vulnerabilities to an institution.

Earn your Certified Community Bank Security Officer (CCBSO) designation
23 CPE credits

ICBA MEMBER: $1,295; TESTING FEE NOT INCLUDED

OCTOBER

RISK MANAGEMENT INSTITUTE℠
Oct. 13-16 | Minneapolis, MN

This new certification program focuses on risk management strategies surrounding bank governance, credit risk, interest rate risk, liquidity risk, operational risk, compliance risk, and legal risk. Attendees will learn the necessary actions to implement an enterprise risk management program. This institute includes an optional (and no-cost) pre-work session that is highly recommended for all participants, especially those with fewer than three years of experience in risk management or those who desire a refresher on the foundational concepts of risk management.

Earn your Certified Community Bank Risk Specialist (CCBRS) designation
22 CPE credits

ICBA MEMBER: $1,295; TESTING FEE NOT INCLUDED
ANNUAL DIRECTORS CONFERENCE

Oct. 14-16 | San Antonio, TX

The role of a community bank director is one that is always changing and has never been more critical to the success of your bank. In its 20th year, ICBA’s Annual Directors Conference is designed to help you guide your bank’s growth and profitability and sustain its vision for the future. Leave this event with innovative practices, new strategies, and creative tactics you can bring back to your bank and implement immediately!

13 CPE credits

ICBA MEMBER: $995; BANK DIRECTOR PROGRAM SUBSCRIBER: $795

NOVEMBER

TRUST DEPARTMENT SEMINAR NEW!

Nov. 5-6 | Minneapolis, MN

Community Banker University is very excited to add this new seminar to our 2020 programming. More information will be coming soon.

12 CPE credits

ICBA MEMBER: $595 BEFORE OCT. 5/$695 AFTER OCT. 5

DATE AND LOCATION TO BE ANNOUNCED

COMMUNITY BANK MARKETING SEMINAR

Retail wars, digital transformation, and customer demand are dramatically changing the landscape of community banking. To succeed in the competitive marketplace, community bank marketers and retail teams must be savvy, forward-thinking, and able to implement game-changing strategies. Participate in two engaging days packed with critical information to propel your community bank’s marketing efforts to the next level.

16 CPE credits

ICBA MEMBER: $595/$695
Are you looking for comprehensive training that’s economical and allows you to train multiple staff at once? Community Banker University offers a variety of online training options that can be used for the individual learner or to help all bank employees build a strong foundation within key areas of the banking industry.

**DID YOU KNOW?**

- By 2020, 98 percent of small businesses are planning to use a Learning Management System to fulfill their learning requirements.
  —SmallBizTrends
- 72 percent of organizations worldwide say that eLearning helps them gain competitive advantage.
  —eLearningIndustry
- Comprehensive training programs lead to a 218 percent higher revenue per employee.
  —Deloitte
# ONLINE TRAINING

## PAYMENT PLAN OPTIONS »

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<th>ONLINE TRAINING PLATFORM</th>
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<tr>
<td>Minimum subscription</td>
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<td>Access to more than 300 courses covering Compliance, Security, Management, Information Technology, Customer Service and Sales, Teller Training, Human Resources, Audit, and Health and Safety</td>
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<td>System-generated email alerts for annual mandatory compliance courses and select recommended compliance courses</td>
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<td>Enroll employees in courses by job function</td>
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<td>Access to usage and enrollment reports</td>
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<td>Upload your bank’s policies and procedures into 30+ pre-selected compliance courses</td>
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<td>Create your own custom courses with exams and custom use and enrollment reports</td>
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<td>Store and use custom human resources data, such as job title or hire date, for reporting or course assignment</td>
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<td>Export training course completions for import into human resource system</td>
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### YEARLY PRICE FOR ICBA MEMBERS

- $599
- $1,299
- $8,499* (first year)
- $5,999 (after)

### YEARLY PRICE FOR NON-MEMBERS

- $1,999
- $2,999
- $12,499* (first year)
- $9,999 (after)

### CLOUD DELIVERY PLAN

1 year minimum

**DOES YOUR BANK HAVE A LEARNING MANAGEMENT SYSTEM (LMS)?**

If yes, choose our Cloud Delivery Plan.

Access 300+ courses and upload your bank’s policies and procedures directly from your learning management system through our seamless cloud integration.

- $4,999* (first year)
- $2,499 (after)

- $6,499* (first year)
- $3,999 (after)
ONLINE CERTIFICATE PROGRAMS

ICBA’s collection of certificate programs offer an ideal way to enhance professional skills, gain practical training, explore banking career growth, and affirm expertise — online! Those completing the full online training curriculum receive a certificate of completion from Community Banker University.

Community Banker University offers seven online certificate programs. Our Teller Specialist, Principles of Banking, and Universal Banker Certificate Programs can be purchased for individual use or can be used to train an unlimited number of learners in your bank.

AUDITING CERTIFICATE PROGRAM
This online certificate program equips individuals with the knowledge and tools needed to successfully conduct and perform the internal audit function in their bank.

ICBA MEMBER: $999/INDIVIDUAL

COMPLIANCE CERTIFICATE PROGRAM
The four learning areas in this online certificate program — Lending, Deposits, Operations, and BSA — are designed to give community bankers the knowledge and skills they need to become experts in regulatory compliance.

ICBA MEMBER: $499/INDIVIDUAL

HR GENERALIST CERTIFICATE PROGRAM
A comprehensive eight-part online certificate program representing the body of knowledge you need to serve effectively in an HR Generalist role.

ICBA MEMBER: $499/INDIVIDUAL
HR GENERALIST (CALIFORNIA) CERTIFICATE PROGRAM
A comprehensive eight-part online certificate program, focusing specifically on California employment law, representing the body of knowledge you need to serve effectively in an HR generalist role.

ICBA MEMBER: $499/INDIVIDUAL

TELLER SPECIALIST* CERTIFICATE PROGRAM NEW!
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This comprehensive certificate program arms current and prospective front-line staff with the tools and skills they need to be Universal Bankers.

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*Indicates those that can be purchased for both bank-wide and individual use.

EACH CERTIFICATE PROGRAM INCLUDES LEARNING OBJECTIVES AND A COMPREHENSIVE EXAM(S). A CERTIFICATE IS ISSUED UPON SUCCESSFUL COMPLETION OF THE RESPECTIVE PROGRAM’S CRITERIA.
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THE COMPLIANCE VAULT
The Compliance Vault is a reliable search tool that helps you find answers to your compliance questions with access to nearly 2,500 Q&As, select eLearning courses, and documents. Find up-to-date answers about topics from across the regulatory compliance spectrum, written by Community Banker University® instructors, industry compliance experts, and regulatory agencies. The Compliance Vault is a complimentary benefit of ICBA membership.

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BANK POLICIES
Community Banker University's Bank Policies provide a quick reference with thorough, easy-to-read instructions to guide your bank through the policy development or revision process. If amendments are made to a policy within 12 months of purchase, you will automatically receive the revised text necessary to keep your policy in compliance with regulatory expectations. There are more than 95 policies available covering everything from compliance to lending to social media.

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The foremost and largest program of its kind, the Bank Director Program helps prepare your entire board of directors for effective corporate governance. Nearly 13,000 bank directors have participated in the program. Exclusive program features and benefits of the Bank Director Program include:

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- 24/7 access on computer, tablet, or mobile phone

**EXCLUSIVE BANK DIRECTOR NEWSLETTER**
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- Compliance and regulatory essentials, written by industry experts
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VISIT WWW.ICBA.ORG/BDP FOR MORE INFORMATION.
With oversight responsibilities as far flung as digital payments trends and compliance management, your bank’s board of directors has a lot on its plate. Community Banker University’s new Bank Director Video Training Series presents important topics, such as succession strategies, corporate governance, and other director fundamentals, in a convenient and easy-to-digest format to ensure bank directors can stay on top of evolving industry trends and regulations.

The Bank Director Video Series is ideal for board meetings or as assigned study for your directors. Video content is organized by topic into separate chapters allowing you to easily present specific information.

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**BANK DIRECTOR VIDEO CHAPTERS INCLUDE:**

1. Congratulations, You are a Community Bank Director
2. Effective Community Bank Corporate Governance
3. The Role of the Chairman and Effective Board Committees
4. Board of Directors’ Roles in Community Bank Strategic Planning
5. Introduction to Compliance, Examinations, and the Bank Regulatory Process
6. The Community Bank Holding Company
7. Succession Strategies for Long-Term Success
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