



AIB PERSONAL BANKING DIPLOMA

NAME _____

DATE _____

This course of study, leading to the AIB Personal Banking Diploma, addresses the appropriate mix of banking knowledge and skills for Personal Bankers, sometimes referred to as Financial Services Representatives or Financial Services Associates, to provide full-service banking to customers by providing appropriate credit, deposit and other banking services that meet customer needs and expectations.

Personal Bankers often drive the sales and service function in the bank office or branch and call on potential and current customers to develop new business relationships and to support customer retention strategies. They require broad product knowledge, including specific understanding of the different types of retail deposit and loan products, which are covered in this curriculum.

Required Courses

You must complete the following courses.

Grade	Course	Delivery Options			
	AIB Principles of Banking				
	Building and Retaining Customer Relationships				
	Consumer Credit Products				
	Cross-Selling Deposit Products				
	Dealing Effectively with Co-Workers				
	Effective Referrals				
	Ethical Issues for Bankers				
	Fundamentals of Consumer Lending				
	Introduction to Relationship Selling				
	Managing Time at Work				
	Overview of Financial Statements				
	Regulatory Compliance for Personal Bankers				
	Tele-Consulting				
	Writing Bank Correspondence				

The AIB Personal Banking Diploma meets the pre-certification education requirements for the Certified Personal Banker (CPB) designation through the Institute of Certified Bankers (ICB).

AIB Diploma Code: 64

AIB

Visit www.aba.com/training, call **1-800-BANKERS** or contact your Local ABA Training Provider for more information.