



Professional Bank Teller Certificate

Clients are demanding personal service and our "Professional Bank Teller Certificate" will teach your employees how to Enhance the critical conversation skills of personal bankers-Presence, Relating, Listening, Questioning, Positioning and Checking.

Original Price: \$799

Course Details

- **Credit Cards: Disclosure Requirements**

Duration: 90 Min

Code: 20081

This informative program examines required disclosures for revolving credit on credit cards with an emphasis on new loan disclosures and periodic billing statements.

- **Credit Cards: Regulations and Liabilities**

Duration: 60 Min

Code: 20080

With this informative program, employees will learn:

- Credit card issuance
- Actions taken on accounts
- Liabilities of cardholders

- **Decedent Accounts**

Duration: 60 Min

Code: 20234

This course addresses the complex issues surrounding the proper handling of an account upon the depositor's death.

Key topics include the following:

- ✓ Responsibilities of a financial institution after the death of a depositor
- ✓ Legal definitions of decedent accounts
- ✓ Types of decedent estates
- ✓ Items needed to service decedent accounts
- ✓ How to identify the authorized recipient of funds of a decedent account
- ✓ State and federal laws regarding inheritance, estate and gift taxes

- **Deposit Account Fundamentals**

Duration: 90 Min

Code: 20311

www.markettraderacademy.com

www.certifiedbanker.org

This course delves into the variety of deposit accounts available from financial institutions today and explores the features and benefits of each. This course will teach you to differentiate between the various characteristics of deposit accounts, as well as identify the features and benefits of the deposit accounts. Learn more about distinguishing between various types of account ownership, differentiate between simple and compound interest and tiered rate structures, and distinguish between the various types of account ownership. Additionally, you'll determine how to counsel customers regarding various types of investments and identify the various steps in opening deposit accounts.

- **Safe Deposit Boxes: Daily Routines**

Duration: 30 Min

Code: 20078

In this course about safe deposit boxes, you'll learn to determine your role as a custodian, identify the various types of safe deposit agreements, recognize how to handle various customer interactions, and determine how to assist customers who need to access their safe deposit box.

- **Safe Deposit Boxes: Opening Procedures**

Duration: 30 Min

Code: 20077

In this course about safe deposit boxes, you'll learn to determine your role as a custodian, identify the various types of safe deposit agreements, recognize how to handle various customer interactions, and determine how to assist customers who need to access their safe deposit box.

- **Balancing Daily Transactions**

Duration: 30 Min

Code: 20313

This course helps tellers balance accurately and explains how to detect and prevent differences.

Key topics include:

- ✓ "Balancing" and why it is important to financial institutions
- ✓ the internal and external controls of the balancing process
- ✓ "Difference reconciliation" and the common errors that may result
- ✓ How balancing errors are resolved
- ✓ Techniques commonly employed to minimize cash transaction errors

- **Check Fraud Prevention**

Duration: 30 Min

Code: 20310

This course helps you detect check fraud schemes and shows you how to prevent them. You will determine the parts of a check and their functions and recognize signs of criminal behavior during attempts to pass fraudulent checks.

- **Ethics: Policy and Personal Judgment for Tellers**

Duration: 30 Min

Code: 20202TEL

Ethics violations often result in media spotlight. Do you know how to handle ethical situations you may encounter? This course teaches employees how to evaluate individual circumstances to determine the best course of action. It provides a review of the BBA, several real-life scenarios and an easily remembered "Ultimate Ethical Test." This course is specifically geared for tellers.

- **Introduction to Checks**

Duration: 60 Min

Code: 20314

Have you ever wondered how checks are handled at your financial institution? This course will help you determine the definition of a check and how it works as a medium of exchange. After completing this course, you'll also be able to identify the essential elements of a check, recognize the six basic types of checks, and identify the check-clearing process and any exceptions that may arise.

- **Teller Operations: Endorsements**

Duration: 30 Min

Code: 20069

This training program examines endorsement terminology, guidelines and procedures, the different types of payees and endorsers, special endorsements and playability conditions, and liabilities for unpaid returned checks.

- **Teller Operations: Identification**

Duration: 30 Min

Code: 20070

This informative program explains which common transactions require identification, types of acceptable identification, and how to verify and record identity information.

- **Teller Orientation: Regs and Disclosures**

Duration: 90 Min

Code: 20024

Become familiar with various regulations and their disclosure requirements. This program covers TISA, the Expedited Funds Availability Act, Regulation D, Regulation E, and IRS reporting.

- **Teller Orientation: Regs and Liability Prevention**

Duration: 90 Min

Code: 20025

Specifically geared for tellers, this course provides an overview of various regulations and focuses on how to prevent regulatory liability. It covers FCRA, BSA, the Right to Financial Privacy Act, Regulation O, the Bank Bribery Statute, and much more.

- **Teller Orientation: Regulatory Signage**

Duration: 90 Min

Code: 20023

In this teller orientation course, you'll learn how to determine what is covered by the FDIC and recognize required disclosure signs, as well as the components of an HMDA Notice. Additionally, you will be able to indicate what comprises a CRA Notice and identify the purpose of the Fair Housing Act and its required posters.

- **Teller Success: Customer Priority**

Duration: 60 Min

Code: 20018

With this course, you'll learn ways to meet customer needs by using effective communication skills and recognize how to meet customer needs through a variety of loans provided to individuals and businesses. You'll also determine how to keep the customer's information confidential and distinguish how to enhance the professional image and performance through product and service knowledge.

- **Teller Success: Money Handling**

Duration: 30 Min

Code: 20016

Employees will learn to recognize the physical components of U.S. coin and currency, how to detect altered and counterfeit currency, guidelines for setting up and securing a money drawer, plus the necessary steps for receiving or paying out money.

- **Teller Success: Negotiable Instruments**

Duration: 30 Min

Code: 20017

Train your new tellers on the different types of negotiable instruments and the different types of endorsements. Tellers will learn the guidelines for requiring identification from individuals and detecting check fraud.

- **Tellers: Cross-Selling... A Customer Service Skill**

Duration: 30 Min

Code: 20043

In this course you'll learn to identify cross selling as a customer service skill. You'll also learn to recognize the six steps to effective cross-selling on the teller line, determine the step-by-step instructions for effectively overcoming objections, and indicate the product-service benefits that may appeal to a variety of customers with different needs.