

# 2023-2024

## ► PROFESSIONAL DEVELOPMENT



Welcome to NH Bankers Association's 2023-2024 Professional Development offerings. We've made it easy for you to see what programs are geared to you by occupation and career development.

A full calendar of events is included - save the dates!

**NH Bankers**  
ASSOCIATION

[nhbankers.com](http://nhbankers.com)

# Career DEVELOPMENT

*Plan your continued learning with our career-focused continued education.*

## Emerging Leaders

- ▶ Capitol Day
- ▶ Emerging Leaders Conference
- ▶ Emerging Leaders Forum w/CPA Society
- ▶ New England School of Financial Studies
- ▶ Northern New England School of Banking
- ▶ ABA-Wharton Emerging Leaders Certificates
- ▶ Young Bankers Peer Group

## Managers

- ▶ ABA Supervisor/Team Leader Certificate
- ▶ ABA Branch Manager Certificate
- ▶ ABA Workplace Skills Courses

## CEO/Market President/ Senior Managers

- ▶ American Bankers Association Washington Summit
- ▶ Fall Washington Visit
- ▶ Independent Community Bankers of America Capital Summit
- ▶ NH & VT Bankers Annual Conference
- ▶ Spring Executive Management Meeting
- ▶ SBS Institute Certified Banking Security Executive

## Directors

- ▶ Directors Education Series
- ▶ FDIC Directors College
- ▶ Trustees and Directors Forum

## For Everyone

- ▶ ABA Certificate Programs
- ▶ NH Bankers Annual Meeting
- ▶ OnCourse Learning Webinars
- ▶ Women in Leadership
- ▶ Franklin Pierce University Partnership Offering Discount for Online Degrees
- ▶ UNH/Paul College Partnership Offering Discount for Masters Degrees



# Occupation DEVELOPMENT

Plan your job-focused learning with education for occupational development.



## Advocacy/Grassroots

- ▶ American Bankers Association Washington Summit
- ▶ Capitol Day
- ▶ Fall Washington Visit
- ▶ Independent Community Bankers of America Capital Summit



## Business, Commercial Lending and Credit

- ▶ Credit Analyst Development Program
- ▶ Commercial Lending Development Program
- ▶ ABA Business & Commercial Lending Certificate
- ▶ ABA Small Business Banker Certificate
- ▶ ABA Financial and Credit Risk Management Certificate
- ▶ Commercial Lending Peer Group



## Compliance

- ▶ Compliance Conference
- ▶ Fall Compliance Workshop
- ▶ BSA Workshop
- ▶ Certified Cryptocurrency Investigator Program
- ▶ ABA Compliance Certificates
  - BSA/AML
  - Compliance Essentials
  - Deposit Compliance
  - Lending Compliance Core Concepts
  - Mortgage Lending Compliance
- ▶ Compliance Peer Group



## Consumer Lending

- ▶ Tri-State Mortgage Conference
- ▶ ABA Mortgage Lending Certificate
- ▶ ABA Mortgage Lending Compliance Certificate
- ▶ Mortgage Peer Group



## Retail

- ▶ ABA Retail Banking Certificates
  - Bank Financial Management
  - Bank Solutions Provider
  - Bank Teller
  - Branch Manager
  - Customer Service Rep
  - Personal Banker
  - Supervisor/Team Leader
  - Universal Banker
- ▶ Retail Banking Conference
- ▶ Retail Peer Group



## Security and Risk Management

- ▶ Bank Security Seminar
- ▶ ABA Risk Management Certificates
  - Operational Risk Management
  - Risk Management Frameworks
  - Fraud Prevention
- ▶ Fraud/Risk Management Peer Group



## Technology

- ▶ ABA Cybersecurity Awareness Training
- ▶ IT Peer Group



## Trust & Wealth Management

- ▶ Tri-State Trust Forum
- ▶ ABA Certificates
  - Trust Administration
  - Core Concepts for Fiduciary Advisors
  - Fiduciary Principles and Ethics
  - Fiduciary Relationship Management
  - Fiduciary Risk and Compliance
  - Integrated Wealth Planning and Advice
- ▶ Trust Peer Group

**NH Bankers**  
ASSOCIATION



2023-2024  
PROFESSIONAL DEVELOPMENT

For more information on all our programs,  
contact Sandy Tracy at [stracy@nhbankers.com](mailto:stracy@nhbankers.com)  
or 603-224-5373.

# ABA Learning CERTIFICATES

*Build the skills necessary to prepare for a career in banking or to enhance the skills and knowledge you already have.*



MAINE BANKERS ASSOCIATION  
NEW HAMPSHIRE BANKERS ASSOCIATION  
VERMONT BANKERS ASSOCIATION

Maine, New Hampshire and Vermont Bankers Associations are your Local ABA Training Providers.

*Members of Maine, New Hampshire and Vermont Bankers Associations receive member pricing. You do not need to be a member of the American Bankers Association to receive this member benefit.*

## ABA Bank Solutions Provider Certificate

**Credit earned:** 1.5 CAFP, CFSSP, CRCM; 1.25 CSOP; 1.25 CFMP; 1.0 CCTS, CISP, CLBB, CRSP, CTFA

**Member cost:** \$495

**Duration:** 6.5 hours

## ABA Bank Teller Certificate

**Credit earned:** 1.5 CAFP, CFSSP, CRCM, CLBB; 1.25 CFMP, CSOP; 1 CCTS, CISP, CRSP, CTFA

**Member cost:** \$695

**Duration:** 12 hours

## ABA Branch Manager Certificate

**Credit earned:** 1.75 CFMP; 1.5 CAFP, CFSSP, CRCM; 1.25 CSOP; 1.0 CCTS, CISP, CLBB, CRSP, CTFA

**Member cost:** \$1,295

**Duration:** 14 hours

## ABA Certificate in Asset Management

**Credit earned:** 13 CTFA, 8.5 CRSP, 8.00 CSOP, 0.50 CISP

**Member cost:** \$1,795

**Duration:** 9 hours

## ABA Certificate in Bank Financial Management\*

**Credit earned:** 72 CERP; 1 CAFP, CCTS, CFMP, CFSSP, CISP, CLBB, CRCM, CRSP, CSOP

**Member cost:** Individually priced

\*The ABA Certificate in Bank Financial Management is unique in it consists of a combination of facilitated courses and self-paced courses. This certificate is not purchasable as a whole curriculum - users must purchase the courses within the certificate individually. Upon completion, the user may request a printed certificate.

## ABA Certificate in BSA and AML Compliance

**Credit earned:** 8.5 CAFP; 8.75 CRCM; 7.75 CFSSP; 3.25 CTFA(FID); 2.0 CCTS; 1.25 CSOP

**Member cost:** \$1,595

**Duration:** 7 hours

## ABA Certificate in Business and Commercial Lending

**Credit earned:** 42.0 CLBB, 3.75 CERP (self-paced); or 90.0 CLBB (facilitated)

**Member cost:** \$1,295

**Duration:** 33 hours

## ABA Certificate in Compliance Essentials

**Credit earned:** 14.75 CRCM, 10.25 CERP, 3 CAFP, 1.25 CCTS, CSOP

**Member cost:** \$1,995

**Duration:** 12 hours 5 min

## ABA Certificate in Core Concepts for Fiduciary Advisors

**Credit earned:** 4.5 CTFA, 2.75 CCTS, 3.25 CRSP, 2.0 CSOP

**Member cost:** \$895

**Duration:** 3 hours 30 min

## ABA Certificate in Deposit Compliance

**Credit earned:** 7.25 CRCM, 4.25 CERP, 3.00 CAFP, 1.75 CSOP, 1 CFMP

**Member cost:** \$995

**Duration:** 5.5 hours

## ABA Digital Banker Certificate

**Credit earned:** 2.75 CFMP, 2.0 CAFP, 1.75 CRCM, 0.75 CSOP

**Member cost:** \$495

**Duration:** 3 hours

## ABA Certificate in Fiduciary Principles and Ethics

**Credit earned:** 2.25 CTFA, 1.5 CCTS, CRSP, CSOP

**Member cost:** \$395

**Duration:** 1 hour 30 min

## ABA Certificate and Fiduciary Relationship Management

**Credit earned:** 7.0 CTFA

**Member cost:** \$1,295

**Duration:** 5 hours

## ABA Certificate in Fiduciary Risk and Compliance

**Credit earned:** 2.25 CTFA, 1.25 CSOP, 1.25 CISP, 1.25 CRSP

**Member cost:** \$595

**Duration:** 2 hours 30 min

## ABA Certificate in Financial and Credit Risk Management

**Credit earned:** 7.0 CERP

**Member cost:** \$1,295

**Duration:** 5 hours 15 min

# ABA Learning CERTIFICATES

## ABA Certificate in Fraud Prevention

**Credit earned:** 6.75 CAFP, CFSSP; 2.0 CRCM

**Member cost:** \$795

**Duration:** 5 hours 20 min

## ABA Certificate in General Banking\*

**Credit earned:** 37.5 CLBB; 15 CFMP

**Member cost:** Individually priced

\*The ABA Certificate in General Banking is unique in that it consists of a combination of facilitated courses and self-paced courses. This certificate is not purchasable as a whole curriculum - users must purchase the courses within the certificate individually. Upon completion, the user may request a printed certificate.

## ABA Certificate in Integrated Wealth Planning and Advice

**Credit earned:** 19.75 CTFA, 5.25 CISP, 4.75 CRSP, 0.75 CSOP

**Member cost:** \$2,395

**Duration:** 12 hours

## ABA Certificate in Lending Compliance Core Concepts

**Credit earned:** 10.75 CRCM, 6.25 CERP, 2.25 CAFP

**Member cost:** \$1,095

**Duration:** 8.5 hours

## ABA Certificate in Mortgage Lending Compliance

**Credit earned:** 17.5 CRCM, 8.75 CERP, 2.25 CAFP

**Member cost:** \$1,995

**Duration:** 13.5 hours

## ABA Certificate in Operational Risk Management

**Credit earned:** 9.25 CAFP; 12.75 CERP; 11.5 CRCM; 9.75 CSOP; 5.5 CFSSP

**Member cost:** \$1,595

**Duration:** 10 hours

## ABA Certificate in Risk Management Frameworks

**Credit earned:** 9.75 CERP

**Member cost:** \$1,395

**Duration:** 8 hours

## ABA Certificate in Trust Administration

**Credit earned:** 9 7.75 CTFA, 2.75 CSOP, 1.50 CCTS, 0.75 CRSP

**Member cost:** \$895

**Duration:** 5 hours 30 min

## ABA Customer Service Representative Certificate

**Credit earned:** 1.5 CAFP, CFSSP, CRCM, CLBB; 1.25 CFMP, CSOP; 1 CCTS, CISP, CRSP, CTFA

**Member cost:** \$795

**Duration:** 10.5 hours

## ABA Foundational Certificate in Bank Marketing

**Credit earned:** 49.00 CFMP, 1.25 CRCM, CSOP

**Member cost:** \$1,095

**Duration:** 17 hours

## ABA Health Savings Account (HSA) Expert Certificate

**Credit earned:** 5.25 CISP, CRSP, CTFA

**Member cost:** \$795

**Duration:** 2.5 hours

## ABA Personal Banker Certificate

**Credit earned:** 1.5 CAFP, CFSSP, CRCM, CLBB; 1.25 CFMP, CSOP; 1 CCTS, CISP, CRSP, CTFA

**Member cost:** \$795

**Duration:** 13.5 hours

## ABA Private Banker Certificate

**Credit earned:** 23.5 CTFA; 11.75 CERP; 7 CRSP; 3.75 CSOP; 2.5 CISP; 0.75 CCTS

**Member cost:** \$ 3,495

**Duration:** 28 hours 30 min

## ABA Residential Mortgage Lender Certificate

**Credit earned:** 1.5 CAFP, CFSSP, CRCM, CLBB; 1.25 CFMP, CSOP; 1.0 CCTS, CISP, CRSP, CTFA

**Member cost:** \$775

**Duration:** 24 hours

## ABA Small Business Banker Certificate

**Credit earned:** 1.5 CFMP, 3.75 CSOP, 11 CTFA, 12 CLBB

**Member cost:** \$495

**Duration:** 11 hours

## ABA Supervisor/Team Leader Certificate

**Credit earned:** 1.5 CAFP, CFSSP, CRCM; 1.25 CFMP, CSOP; 1 CCTS, CISP, CLBB, CRSP, CTFA

**Member cost:** \$895

**Duration:** 9.5 hours

## ABA Universal Banker Certificate

**Credit earned:** 1.5 CAFP, CFSSP, CRCM; 1.25 CFMP, CSOP; 1 CCTS, CISP, CLBB, CRSP, CTFA

**Member cost:** \$795

**Duration:** 9.5 hours

## ABA Wharton Emerging Leaders Certificate: Strategy

**Credit earned:** N/A

**Member cost:** \$1,695

**Duration:** 20 hours

## ABA Wharton Emerging Leaders Certificate: Engaging and Motivating Talent

**Credit earned:** N/A

**Member cost:** \$1,695

**Duration:** 18 hours

## ABA Wharton Emerging Leaders Certificate: Advanced Emerging Leadership

**Credit earned:** N/A

**Member cost:** \$695

**Duration:** 41 hours

**NH Bankers**  
ASSOCIATION



2023-2024

PROFESSIONAL DEVELOPMENT

Certificate listings are current as of October 20, 2023.  
Questions? Contact Sandy Tracy at [stracy@nhbankers.com](mailto:stracy@nhbankers.com) or 603-224-5373.



# 2023 NH Bankers **EVENT DATES**

*Save the dates! Notification on each event will occur when registration opens.*



## **SEPTEMBER**

### **NH & VT Bankers Annual Conference**

Quebec City, QC  
*September 15-17*

### **Women's Golf Tournament w/NH CPA Society**

Goffstown, NH  
*September 25*

### **Tri-State Trust Forum**

Portsmouth, NH  
*September 28-29*

### **Fall Washington Visit**

Washington, DC  
*September 28-29*



## **OCTOBER**

### **Emerging Leaders Forum w/CPA Society & NH Bar Assn**

Manchester, NH  
*October 5 - Postponed*

### **Northern New England School of Banking**

Portsmouth, NH  
*October 16-20*

### **Understanding Bank Performance**

Virtual  
*October 30, 31  
November 6, 7, 13, 14, 20, 21*

### **Trustees and Directors Forum**

Concord, NH  
*October 31*



## **NOVEMBER**

### **BSA/AML/CFT Wrap Up 2023**

Virtual  
*November 1-2*

### **Fall Compliance Workshop**

Concord, NH  
*November 15*



# 2024 NH Bankers EVENT DATES

## JANUARY

### Emerging Leaders Conference

Virtual  
January 9

### Northern New England CFO Conference

TBD  
April 4-5

## FEBRUARY

### Tri-State Mortgage Conference

Portsmouth, NH  
February 8-9

## MAY

### Independent Community Bankers of America Capital Summit

Washington, DC  
TBD

## MARCH

### New England State Bankers Associations Regional Large Bank Legislative Meeting

Boston, MA  
March 10-11

### Spring Executive Management Meeting

Bretton Woods, NH  
May 9-10

### Capitol Day

Concord, NH  
March 5

### New England School of Financial Studies

Wellesley MA  
TBD

### American Bankers Association Washington Summit

Washington DC  
March 18-20

### Compliance Conference

Concord, NH  
May 21-22

## MARCH - JUNE

### Commercial Lending Development Program

Virtual  
March 20-21  
April 18-19  
May 16-17  
June 6-7

## JUNE

### Bank Security Seminar

Concord, NH  
TBD

### FDIC Directors College

Concord, NH  
TBD

### NH Bankers Annual Meeting

Concord, NH  
June 14

## APRIL

### Women in Leadership

TBD  
April 30

2023-2024

PROFESSIONAL DEVELOPMENT



[nhbankers.com](http://nhbankers.com)

**NH▶Bankers**  
ASSOCIATION

P.O. Box 2586  
Concord, NH 03302-2586  
**603.224.5373**