

Career Training Tracks



Let the NBA's education and training programs help you guide your staff development.

The NBA Career Training Tracks are:

- Flexible to meet specific needs
- Multi-level
- Skill builders
- Creating strong bankers now and into the future

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Career Training Tracks

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Nebraska Bankers Association Career Training Track

Employee Name: _____

Position: **Branch Manager**

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The officer directly in charge of the operations and employees of a detached facility or branch. May or may not involve lending (if lending, please refer to Loan Officer track).

Date Completed	RECOMMENDATIONS:	1st Year	1 to 2 Years	3 to 5 Years	After 5 Years	Annually/ Ongoing
Courses (AIB)						
	Principles of Banking or Banking Today		Live,Online,Corresp.			
	Introduction to Relationship Selling	Live, Online				
	Managing Employee Relations		Live, Online			
	Rewards & Recognition		Live, Online			
	Hiring the Best	Live, Online				
	Ethical Issues for Bankers	Live, Online				
	Sales Coaching in the Bank	Online				
Conferences/Workshops/Seminars						
	Compliance Conferences & Workshops					As available
	New Accounts Titling & Ownership Sem.					As available
	Deposit Accounts Administration Wkshp.	March				March (annually)
	Tri-State Leadership & H.R. Conference	March				March (annually)
	Area Banker Meetings	August				August (annually)
	Bank Technology Conference					February (annually)
	Bank Security & Fraud Seminars					As available
Schools						
	School of Banking Fundamentals	April				
	School of Lending Principles		March			
	Sales Management School		February or March			
	Advanced School of Banking-Year 1			September or October		
	Advanced School of Banking-Year 2			June		
	Principles of Commercial Lending		October			
Leadership Program						
	Apply for Leadership Program				Apply in December	

Nebraska Bankers Association Career Training Track

Employee Name: _____

Position: *Cashier*

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Develops or approves operational policies and procedures.
Provides board direction for the operational areas of customer service, proof, bookkeeping, clerical support and possibly data processing and branch operations.

Date Completed	RECOMMENDATIONS:	1st Year	1 to 2 Years	3 to 5 Years	After 5 Years	Annually/ Ongoing
Courses (AIB)						
	Principles of Banking or Banking Today		Live,Online,Corresp.			
	Financial Accounting		Live,Online,Corresp.			
	Law & Banking: Applications		Live,Online,Corresp.			
		Online				
Conferences/Workshops/Seminars						
	Deposit Account Admin. Workshop	March				March (annually)
	Bank Compliance Workshop	September & April				Sept & Apr (annually)
	Bank Security & Fraud Seminars		TBA			Annually as offered
	Bank Technology Conference	February				February (annually)
Schools						
	Operations School		May			
	Advanced School of Banking-Year 1			Sept or Oct		
	Advanced School of Banking-Year 2			June		
Leadership Program						
	Apply for Leadership Program				Apply in December	

Nebraska Bankers Association Career Training Track

Officer Name: _____

Position: *CEO-Senior Management*

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Provides leadership, direction and guidance of overall bank or specific department activities to ensure profitability, fair treatment and development of employees, and effective community relations.

Date Completed	RECOMMENDATIONS:	1st Year	1 to 2 Years	3 to 5 Years	After 5 Years	Annually/ Ongoing
Courses (AIB)						
	Analyzing Bank Performance	Online				
	All AIB Courses could be helpful					
Conferences/Workshops/Seminars						
	Annual Convention	April/May				Apr/May (annually)
	Fall Agri-business Conference	September				September (annually)
	Lending Conference	October				October (annually)
	Marketing Conference	October				October (annually)
	Bank Investment Conference	Online				November (annually)
	Legislative Forums	November				Nov/Dec (annually)
	Bank Technology Conference	February				February (annually)
	Bank Executive Conference	February				Feb/Mar (annually)
	Tri-State Leadership & HR Conference	March				March (annually)
	Spring Agri-business Conference	April				April (annually)
	Bank Directors Workshop					February (annually)
	Compliance Based Workshops & Seminars					Ongoing (annually)
	Bank Technology Conference					October (annually)
Schools						
	Advanced School of Banking-Year 1		Sept. or Oct.			
	Advanced School of Banking-Year 2			June		
	Sales Management School		February or March			
Leadership Program						
	Apply for Leadership Program				Apply in December	
	Principles of Commercial Lending		October			

Nebraska Bankers Association Career Training Track

Employee Name: _____

Position: **Compliance Officer**

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Responsible for bank's compliance with applicable federal and state laws and regulations. Also, responsible for reviewing a variety of loans that are completely structured and/or high dollar value to ensure that bank lending policies and financial interests are maintained.

Date Completed	RECOMMENDATIONS:	1st Year	1 to 2 Years	3 to 5 Years	After 5 Years	Annually/Ongoing
Courses (AIB)						
	Principles of Banking or Banking Today		Live, Online, Corresp.			
	Bank Secrecy Act	Live, Online				
	Home Mortgage Disclosure Act	Online				
	Law & Banking: Principles		Live, Online, Corresp.			
	Law & Banking: Applications		Live, Online, Corresp.			
	Ethical Issues for Bankers	Live, Online				
	Real Estate Settlement Procedures Act	Online				
Diplomas/Certifications/Certifications						
	ICB-Certified Regulatory Compliance Mgr.	Online		Apply for Exam		Complete CE credits
Conferences/Workshops/Seminars						
	Compliance w/Federal Lending Regs.	September				September (annually)
	Legislative Forums	November				November (annually)
	Loan Documentation Workshop	November				November (annually)
	Compliance Fund. Conference	April				April (annually)
	Lending Conference	October				October (annually)
	Summit on Regulatory Issues	October				October (annually)
	Subscribe to Compliance Manual					On-going
Schools						
	Bank Compliance School	Jan or Feb				
	Compliance Update School					Jan. or Feb. (annually)
Leadership Program						
	Apply for Leadership Program				Apply in December	

Nebraska Bankers Association Career Training Track

Employee Name: _____

Position: *Head Teller-Teller Supervisor*

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Oversees teller function at one or all facilities, which may include hiring and training new tellers. May develop or approve teller policies/procedures and ensures that area is in compliance with overall bank operating policies and procedures. Makes decisions on non-routine basis.

Date Completed	RECOMMENDATIONS:	1st Year	1 to 2 Years	3 to 5 Years	After 5 Years	Annually/ Ongoing
Courses (AIB)						
	Principles of Banking or Banking Today		Live, Online, Corresp.			
	Performance Management	Live, Online				
	Coaching for Success	Live, Online				
	Corrective Action	Live, Online				
	Hiring the Best	Live, Online				
	Effective Referrals	Live, Online, Test Out				
	Managing Employee Relations		Live, Online			
	Rewards & Recognition		Live, Online			
	Ethical Issue for Bankers	Live, Online				
	Law & Banking: Applications	Online	Live, Online, Corresp.			
	Law & Banking: Principles		Live, Online, Corresp.			
Conferences/Workshops/Seminars						
	IRA Workshops	Sept & Feb				Sept or Feb (annually)
	Savings Bonds Seminars		TBA			Annually as offered
	Deposit Account Admin. Workshop	March				March (annually)
	Bank Security & Fraud Seminars		TBA			Annually as offered
	Bank Technology Conference		TBA			Annually as offered
Schools						
	School of Banking Fundamentals	April				
	Operations School		May			

Nebraska Bankers Association Career Training Track

Employee Name: _____

Position: *Investment Officer - Assistant*

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Manages designated trust investment accounts; analyzes customer account objectives plans patterns of customer portfolios; works with security analysts and tax consultants; coordinates purchases of securities.

Date Completed	RECOMMENDATIONS:	1st Year	1 to 2 Years	3 to 5 Years	After 5 Years	Annually/Ongoing
Courses (AIB)						
	Principles of Banking or Banking Today		Live, Online, Corresp.			
	Analyzing Financial Statements	Live, Online, Corresp.				
	Economics for Bankers	Live, Online, Corresp.				
	Managing Funding Liquidity and Capital		Online			
	Managing Interest Rate Risk		Online			
	Ethical Issues for Bankers	Live, Online				
	Money & Banking			Live, Online, Corresp.		
Conferences/Workshops/Seminars						
	Bank Investment Conference	November				Nov. (annually)
	Bond Accounting 101	November				Nov. (even years)
	Asset/Liability Management 101	March				March (odd years)
Schools						
	School of Banking Fundamentals	April				
	Advanced School of Banking-Year 1		Sept. or Oct.			
	Advanced School of Banking-Year 2			June		
Leadership Program						
	Apply for Leadership Program				Apply in December	

Nebraska Bankers Association Career Training Track

Officer Name: _____

Position: *Loan Officer*

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Under general supervision, but in accordance with established lending policies and procedures, receives and reviews applications. Interviews loan applicants, assembles loan applications and additional loan documents. May approve loans within approved lending limits or presents to senior loan officer.

Date Completed	RECOMMENDATIONS:	1st Year	1 to 2 Years	3 to 5 Years	After 5 Years	Annually/ Ongoing
Courses (AIB)						
	Financial Accounting		Live, Online, Corresp.			
	Analyzing Financial Statements		Live, Online, Corresp.			
	Law & Banking: App. and/or Prin.		Live, Online, Corresp.			
	Principles of Banking	Live, Online, Corresp.		Live, Online, Corresp.		
	Money and Banking					
	Writing Bank Correspondence		Live, Online			
	Problem Loan Workouts	Online				
	Ethical Issues for Bankers	Live, Online				
	Managing Time at Work		Live, Online			
	Presentation Skills	Online				
Conferences/Workshops/Seminars						
	Lending Conference		October			October (annually)
	Adv. Compliance Fund. Conference		September			September (annually)
	Loan Documentation Workshop	November				November (annually)
	Summit of Regulatory Issues	October				October (annually)
Schools						
	School of Lending Principles		March			
	Advanced School of Banking-Year 1			Sept or Oct		
	Advanced School of Banking-Year 2			June		
	Graduate Schools: Wis., Colo., D.C.				June, July or August	

Nebraska Bankers Association Career Training Track

Officer Name: _____

Position: *Loan Officer*

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Under general supervision, but in accordance with established lending policies and procedures, receives and reviews applications. Interviews loan applicants, assembles loan applications and additional loan documents. May approve loans within approved lending limits or presents to senior loan officer

Date Completed	RECOMMENDATIONS:	1st Year	1 to 2 Years	3 to 5 Years	After 5 Years	Annually/ Ongoing
Leadership Program						
	Apply for Leadership Program				Apply in December	
Specific Lending Areas						
Consumer Loan Officer:						
	AIB Consumer Lending	Live, Online, Corresp.				
	AIB Bldg. & Retaining Customer Relations	Live, Online				
	AIB Effective Referrals	Live, Online				
	AIB Introduction to Relationship Selling	Live, Online				
	AIB Writing Bank Correspondence		Live, Online			
Diplomas/Certificates/Certification						
	AIB Consumer Lending Diploma			Request Diploma		
Commercial Loan Officer:						
	AIB Commercial Lending	Live, Online, Corresp.				
	AIB Understanding Your Construction Borrower		Online			
	AIB Credit Products for Sm. Businesses		Online			
	AIB Dealing Effective with Co-Workers		Online			
	AIB Deposit Products for Sm. Businesses		Online			
	AIB Relationship Selling to Sm. Businesses		Online			
	Prin. Of Commercial Lending School	October				
	Commercial Lending School-Year 2		October			
	Adv. Commercial Lending School			August		

Nebraska Bankers Association Career Training Track

Officer Name: _____

Position: **Loan Officer**

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Under general supervision, but in accordance with established lending policies and procedures, receives and reviews applications. Interviews loan applicants, assembles loan applications and additional loan documents. May approve loans within approved lending limits or presents to senior loan officer

Date Completed	RECOMMENDATIONS:	1st Year	1 to 2 Years	3 to 5 Years	After 5 Years	Annually/ Ongoing
	Diplomas/Certificates/Certification					
	AIB Commercial Lending Diploma			Request Diploma		
	ICB Certified Lender-Business Banker				Apply for Exam	Complete CE credits
	Mortgage Loan Officer:					
	AIB Intro. To Mortgage Lending	Live, Online, Corresp.				
	AIB Home Mortgage Disclosure Act		Online			
	AIB Real Estate Settlement Proc. Act		Online			
	AIB Understanding Your Construction Borrower		Online			
	AIB Fund. of Mortgage Lending	Online				
	AIB Effective Referrals	Live, Online, Test Out				
	AIB Introduction to Relationship Selling		Live. Online			
	AIB Personal Tax Return Analysis	Online				
	AIB Profiling Mortgage Prospects		Online			
	AIB Writing Bank Correspondence		Live, Online			
	Diplomas/Certificates/Certifications					
	AIB Mortgage Lending Diploma			Request Diploma		
	Agri-Business Loan Officer:					
	Agricultural Lending (Course)		Online			
	Agri-Business Conferences (Conference)		April & September			Apr & Sept (annually)
	Ag & Beyond (Workshop)		December			December (annually)
	Agricultural Lending School (School)		July			
	Adv. Agricultural Lending School (School)			June (odd years)		

Nebraska Bankers Association Career Training Track

Officer Name: _____

Position: *Loan Clerk-Processor*

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Performs a variety of clerical duties related to the processing, administration and closing of loans. May set-up new accounts and order credit reports.

Date Completed	RECOMMENDATIONS:	1st Year	1 to 2 Years	3 to 5 Years	After 5 Years	Annually/ Ongoing
Courses (AIB)						
	Principles of Banking or Banking Today	Live, Online, Corresp.				
	Ethical Issues for Bankers		Live, Online			
	Business Etiquette	Live, Online				
	Fundamentals of Consumer Lending		Live, Online			
	Fundamentals of Mortgage Lending		Online			
	Home Mortgage Disclosure Act-HMDA	Online				
	Intro. To Analyzing Financial Statements		Online			
	Overview of Financial Statements	Online				
	Real Estate Settlement Proc. Act-RESPA		Online			
	Telephone Etiquette	Live, Online				
	Truth in Lending-Reg. Z	Online				
Conferences/Workshops/Seminars						
	Loan Documentation Workshop		November			November (annually)
	Dealing with Different Business Entities	November				
	Lending Compliance Workshops			As available		As available
Schools						
	School of Banking Fundamentals		April			
	School of Lending Principles			March		

Nebraska Bankers Association Career Training Track

Employee Name: _____

Position: *Manager Trainee*

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Management Trainees typically bring general business education with them but need to experience all aspects of banking functions and departments. As a result of these experiences current management, with the trainee, will determine area for semi-permanent placement within the bank. Many times this employee will work in various bank departments throughout their banking career.

Date Completed	RECOMMENDATIONS:	1st Year	1 to 2 Years	3 to 5 Years	After 5 Years	Annually/ Ongoing
Courses (AIB)						
	Principles of Banking	Live,Online,Corresp.	Live,Online,Corresp.			
	Law & Banking: Principles		Live,Online,Corresp.			
	Law & Banking: Applications	Live,Online,Corresp.				
	Commercial Lending	Live,Online,Corresp.				
	Fundamentals of Consumer Lending	Live, Online				
	Fundamentals of Mortgage Lending	Online				
	Supervision			Live,Online,Corresp.		
	Trust Basics		Live,Online,Corresp.			
	Managing Time at Work			Live,Online		
	Introduction to Mortgage Lending	Online	Live,Online,Corresp.			
	Ethical Issues for Bankers		Live,Online			
Conferences/Workshops/Seminars						
	Lending Conference	October				October (annually)
	Compliance Fund. Conference	September				September (annually)
	Area Banker Meetings	August				August (annually)
	Annual Legal Update Workshop	September				September (annually)
	Bank Technology Conference	February				February (annually)
	Deposit Accounts Admin. Workshop	March				March (annually)
Schools						
	School of Banking Fundamentals	April				
	School of Lending Principles		March			
	Advanced School of Banking - Year 1		Sept or Oct			
	Advanced School of Banking - Year 2			June		
Leadership Program						
	Apply for Leadership Program				Apply in December	

Nebraska Bankers Association Career Training Track

Employee Name: _____

Position: *Marketing Officer*

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Develops and/or administers concepts for the bank: involved in advertising, public relations and business development; may conduct or collaborate in market research projects.

Date Completed	RECOMMENDATIONS:	1st Year	1 to 2 Years	3 to 5 Years	After 5 Years	Annually/ Ongoing
Courses (AIB)						
	Principles of Banking or Banking Today	Live, Online, Corresp.				
	Ethical Issues for Bankers		Live, Online			
	Fin. & Business Planning for Bank Mktrs.	Online				
	Rewards and Recognition		Live, Online			
	Effective Referrals		Live, Online, Test Out			
	Dealing Effectively w/Co-Workers		Live, Online, Test Out			
	Economics for Bankers		Live, Online, Corresp.			
	Event-Based Selling	Online				
	Managing Time at Work		Live, Online			
	Marketing Financial Services	Live, Online, Corresp.				
	Project Management Fund I and II		Online			
Diplomas/Certificates/Certifications						
	AIB Bank Marketing Diploma			Request Diploma		
	ICB-Certified Financial Marketing Profess.			Apply for Exam		Complete CE credits
Bank Technology Conference						
	Marketing Conference	October				October (annually)
	Bank Clubs Workshop	December				Bi-Annually
	Bank Technology Conference	February				February (annually)
Schools						
	School of Banking Fundamentals	April				
	Sales Management School		February or March			
Leadership Program						
	Applications taken bi-annually				Apply in December	

Nebraska Bankers Association Career Training Track

Employee Name: _____

Position: *Personal Banker*

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Refers or arranges a wide variety of banking services to meet clients' diverse needs, including opening accounts, collecting consumer credit applications and may assist in public relations activities.

Date Completed	RECOMMENDATIONS:	1st Year	1 to 2 Years	3 to 5 Years	After 5 Years	Annually/ Ongoing
Courses (AIB)						
	Bldg. & Retain. Customer Relationships	Live, Online				
	Introduction to Relationship Selling	Live, Online				
	Privacy for Customer Contact Personnel	Online				
	Principles of Banking		Live, Online, Corresp.			
	Effective Referrals	Live, Online, Test Out				
	Writing Bank Correspondence		Live, Online			
	Business Etiquette		Live, Online, Test Out			
	Telephone Etiquette		Live, Online			
	Revitalizing Customer Service		Live, Online			
	Dealing Effectively with Co-Workers	Online		Live, Online, Test Out		
	Ethical Issues for Bankers	Live, Online				
	Fundamentals of Consumer Lending		Live, Online			
	Managing Time at Work		Live, Online			
	Overview of Financial Statements		Online			
	Profiling Mortgage Prospects		Online			
	Tele-Consulting		Online			
Specific Function Areas						
Retail Area:						
	Cross-Selling Deposit Products		Live, Online			
	Consumer Credit Products		Online			
Small Bus. Commercial Area:						
	Fundamentals of Small Bus. Banking		Online			
	Dep. Prod. & Serv. For Small Bus.		Online			
	Calling on Small Business Customers		Online			

Nebraska Bankers Association Career Training Track

Employee Name: _____

Position: *Personal Banker*

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Refers or arranges a wide variety of banking services to meet clients' diverse needs, including opening accounts, collecting consumer credit applications and may assist in public relations activities.

Date Completed	RECOMMENDATIONS:	1st Year	1 to 2 Years	3 to 5 Years	After 5 Years	Annually/ Ongoing
	Diplomas/Certificates/Certifications					
	AIB Personal Banking Diploma			Request Diploma		
	ICB-Certified Personal Banker			Apply for Exam		
	Conferences/Workshops/Seminars					
	IRA Workshops	Sept & Feb				Sept or Feb (annually)
	Savings Bonds Seminars		TBA			Annually as offered
	Deposit Account Admin. Workshop	March				March (annually)
	New Accounts Ownership Seminar	April				Annually on-going
	Bank Security & Fraud Seminars		TBA			Annually as offered
	Customer Service Seminars	TBA				Annually as offered
	Schools					
	Sales Management School		February or March			
	School of Banking Fundamentals	April				
	School of Lending Principles		March			
	Leadership Program					
	Apply for Leadership Program				Apply in December	

Nebraska Bankers Association Career Training Track

Employee Name: _____

Position: *Receptionist - Secretary*

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Receives visitors, answers the telephone, performs various clerical functions, including typing, filing, etc.

Date Completed	RECOMMENDATIONS:	Begin 3 to 6 months	Within first 2 Years	After 2 Years	After 3 to 5 Years	Annually/Ongoing
Courses (AIB)						
	Revitalizing Customer Service	Live, Online				
	Principles of Banking/Banking Today		Live, Online, Corresp.			
	Business Etiquette	Live, Online, Test Out				
	Telephone Etiquette	Live, Online				
	Dealing Effectively with Co-Workers		Live, Online, Test Out			
	Effective Referrals	Live, Online, Test Out				
	Writing Bank Correspondence	Live, Online				
Conferences/Workshops/Seminars						
	Customer Service Seminars					TBA
	Bank Security/Fraud Topics					TBA

Nebraska Bankers Association Career Training Track

Employee Name: _____

Position: *Teller*

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Provides service to customers regarding daily transactions, including receipt and payment of cash, answering inquiries, processing certificates and referring customers for appropriate services (open and close accounts).

Date Completed	RECOMMENDATIONS:	Begin 3 to 6 months	Within first 2 Years	After 2 Years	After 3 to 5 Years	Annually/Ongoing
Courses (AIB)						
	Today's Teller: Dev. Basic Skills	Live, Online, Corresp.				
	Revitalizing Customer Service	Live, Online				
	Privacy for Customer Contact Personnel	Online				
	Effective Referrals	Live, Online, Test Out				
	Principles of Banking/Banking Today	Live, Online, Corresp.				
	Business Etiquette		Live, Online, Test Out			
	Telephone Etiquette		Live, Online			
	Dealing Effectively with Co-Workers		Live, Online, Test Out			
	Cross-Selling Deposit Products		Live, Online			
	Ethical Issues for Bankers	Live, Online				
	Introduction to Relationship Selling		Live, Online			
Diplomas/Certificates/Certifications						
	AIB Bank Teller Certificate			Request Certificate		
Conferences/Workshops/Seminars						
	Bank Security/Fraud Topic Seminars					As available
	Customer Service Seminars					As available
	Savings Bonds Seminars					As available
	Front-Line Compliance Seminars					As available
	IRA Workshops					Fall and Spring
	Teller Seminars					As available
Schools						
	School of Banking Fundamentals*		April			
	<i>*If it is expected that this person will be promoted---</i>					

Nebraska Bankers Association Career Training Track

Employee Name: _____

Position: *Trust Officer - Assistant*

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Responsible for the administration of trust accounts where the bank acts in the capacity of personal representative of an estate, trustee under will or trust agreement, guardian of the assets of minors or incompetents under appointment of the court or agent under a custody, safekeeping, or investment management arrangement.

Date Completed	RECOMMENDATIONS:	1st Year	1 to 2 Years	3 to 5 Years	After 5 Years	Annually/ Ongoing
Courses (AIB)						
	Principles of Banking/Banking Today		Live,Online,Corresp.			
	Ethical Issues for Bankers	Live, Online				
	Law & Banking: Applications			Live,Online,Corresp.		
	Law & Banking: Principles			Live,Online,Corresp.		
	Trust Basics	Live, Online, Corresp.				
	Trust Operations	Online				
	Personal Trust Curriculum 1		Online			
	Personal Trust Curriculum 2		Online			
	Personal Trust Curriculum 3		Online			
Diplomas/Certificates/Certifications						
	AIB Corporate Trust Diploma			Request Diploma		
	ICB-Certified Corporate Trust Specialist			Apply for Exam	Apply for Exam	Complete CE credits
	AIB Personal Trust Diploma			Request Diploma		
	Certified Trust and Financial Advisor			Apply for Exam	Apply for Exam	Complete CE credits
Conferences/Workshops/Seminars						
	Bank Investment Conference	November				November (annually)
Schools						
	School of Trust & Financial Services	September				
	Sales Management School		February or March			
	Advanced Trust Administration School			September (odd yrs.)		
	Advanced Trust Operations School			September (even yrs.)		