

AIB Personal Banking Diploma

NAME _____

DATE _____
































Personal Bankers, sometimes referred to as Financial Services Representatives or Financial Services Associates, are responsible for providing 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. They call on potential and current customers to develop new business relationships and to support customer retention strategies. They also sell and cross-sell a variety retail and trust services.

Successful Personal Bankers have acquired broad product knowledge, including specific understanding of the different types of deposit and loan products. Customer service skills are critical to the Personal Banker position along with sales skills that focus on profiling customer needs and offering the appropriate products; therefore, solid interpersonal skills and effective referral skills are necessary as well. In addition, successful Personal Bankers are effective in applying bank policies and procedures, particularly account opening procedures.

Successful Personal Bankers use a customer-focused, needs-based sales approach in carrying out their responsibilities. Superior performers are sales- and service-driven, professional in their conduct and appearance, and ethical in all their dealings. This course of study, leading to the AIB Personal Banking Diploma, addresses the appropriate mix of banking knowledge and skills leading to success.

Required Courses

You must complete the following courses.

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

Legend



Correspondence Course



Instructor-led Online Training



Self-paced Online Training



ICB Approved



Classroom Delivery



Reference Materials