

Fact Sheet to Support Federal and Provincial Tuition Grant Applications

CUIC Inc. (doing business as *Cusource*® Professional Development and Education)
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Curriculum: *CUIC* courses lead to several professional designation and accreditations. (Refer to Appendix A). These courses require the student to pass a proctored 2.0 - 2.5 hour exam (depending on the course) developed and graded by Dalhousie University, Halifax, Nova Scotia.

Training Hours: Each of 10-module course is the equivalent of a 1-semester university course. Each involves approximately 40 to 50 hours of study. The exception is *Credit Unions: Different by Design* which is an 8-module course requiring approximately 32 hours of study.

Course Fees: An all-inclusive fee is based on the study method and the subject matter. The majority of the *CUIC*® self-study courses for CUSOURCE corporate member clients are \$495. The cohort version is \$695. The exception is the *CUIC 345 Business Lending* course which is delivered as an interactive eLearning course with the capacity to print the 10-module study guide. This course is \$695 in self-study mode and \$895 for the cohort version. *Strategy Management (CUIC 315)* is offered as a cohort only.

Exam fees: The \$100 exam fee is included in the tuition fee. A re-write fee is additional.

Required Materials: All *CUIC* courses, with the exception of *Strategic Management (CUIC 315)* include a 10-module industry-specific study guide. *CUIC 225 Financial Management* also requires a university textbook. *CUIC 315, Strategic Management* cohort requires a university textbook only.

Course Delivery Dates: There are two study options: self-study and cohort. Self-study courses are available on a continuous intake basis. Cohorts are offered twice a year. The spring cohort starts at the beginning of March; the fall cohort starts at the beginning of November each year. (Refer to Appendix A)

Exams: Proctored exam sessions are held in March, June, and November annually and are administered at local college and university locations across the country.

Course Credit: Students need to achieve a minimum grade of 60% to pass and receive credit for a *CUIC* course.



Here's a quick and easy reference to help you match your learning needs with our **CUIC®** courses. Take them as stand-alone courses or as credits towards a **CUIC** designation or accreditation, along with other **CuSource®** courses.

Course Title →	Products & Services	Credit Unions: Different by Design*	Consumer & Residential Mortgage Lending	Financial Management	Fundamentals of Personal Financial Planning	Strategic Management	Human Resources Management	Commercial Mortgage Lending	Business Lending	Agricultural Lending
Course Codes* →	CUC-185-PRSRE07-SLS CUC-185-PRSRE07-CHR	CUC-201-CRDDE01-SLS CUC-201-CRDDE01-CHR	CUC-210-CRMLE11-SLS CUC-210-CRMLE11-CHR	CUC-225-FNMNE03-SLS CUC-225-FNMNE03-CHR	CUC-240-PPFPE10-SLS CUC-240-PPFPE10-CHR	CUC-315-SMCUE01-CHR	CUC-325-HMRME04-SLS	CUC-340-CMMLE04-SLS CUC-340-CMMLE04-CHR	CUC-345-BSLNE02-SLS CUC-345-BSLNE02-CHR	CUC-346-AGLNE06-SLS
Module 1	Saving Services	Credit Unions: Our Roots. Our Story	Introduction to Consumer Lending	Overview of Financial Management in Credit Unions	The Financial Planning Process	Strategic Management: An Overview	HR Management: A Strategic Perspective	Commercial Mortgages	Introduction to Business Lending	Introduction to Agricultural Lending
Module 2	Registered Plans	A System Built on Collaboration and Connection	The Loan Application Process	Interpreting Financial Success Using Financial Statements, Ratio & Trend Analysis	Net Worth, Cash Flow & Debt Management	Analyzing the External Environment of the Firm	HR Planning Process	Credit Unions & Commercial Mortgage Lending	Financial Statements	Farm Product Marketing
Module 3	Lending Services	You're Part of Something Big	The Credit Decision	Financial Structure & Asset Management	Risk Management & the Role of Insurance	Analyzing the Internal Environment of the Firm	Employment Equity and Diversity Management	Beginning the Loan Investigation	Cash Flow	Risk Characteristics
Module 4	Card & Payment Services	Financial Services: The Playing Field and the Players	Loan Documentation, Monitoring, Collections & Financial Guidance	Time Value of Money Considerations	The Financial Marketplace & Investment Products	Recognizing a Firm's Intellectual Assets	Organizational Culture	Appraisal & Evaluation	The Loan Investigation Process	Agricultural Lending in Credit Unions
Module 5	Transaction Services	Playing by the Rules	Mortgage Law & Mortgage Insurers	Macro-economic Considerations	Investment Planning	Business Level Strategy	Organizational Staffing	Analyzing the Credit Application	Security	The Loan Application Process
Module 6	Investment Services	Financial Statements: Our Story in Numbers	Processing The Mortgage Loan Application	Risk Management Considerations	The Income Tax System	Corporate Level Strategy	Training & Development	Special-Purpose Financing	Structuring the Loan	Financial Analysis
Module 7	Estate Planning	Building Capacity, Strength and Resilience	Mortgage Loan Application	Asset/Liability Management (ALM)	Tax Planning	Disruptive Environments & Digital Business Strategy	Compensation	Disbursements, Documentation & Monitoring	Loan Disbursements and Monitoring	Whole Farm Analysis
Module 8	Insurance Services	Preparing for the Future	Discharge & Prepayment Procedures	Capital Adequacy & Deposit Protection	Retirement Planning	Strategy Control & Corporate Governance	Supporting Employee Health & Well-Being	Problem Accounts	Problem Accounts	Collateral Appraisal & Evaluation
Module 9	Financial Planning Services		Member Contact Skills	Operations Management	Estate Planning	Creating Effective Organizational Designs	Employee & Employer Rights & Responsibilities	Business Development	Prospecting for Business Loans	Security, Legal Issues & Disbursements Plans
Module 10	Other Services, Packages and Programs		Consumer Lending Business Development	Financial Reporting	The Comprehensive Financial Plan	Strategic Leadership & Innovation and Growth	Labour Relations	Negotiating & Closing	Negotiation and Closing	Monitoring & Collections

*Course codes ending in SLS indicate self-study options and codes ending in CHR indicate [cohort](#) options.

*CUC-201: Credit Unions: Different by Design will replace CUC-200 The Credit Union System course in our program requirements

Questions? Client Solutions is happy to help. clientsolutions@ccua.com or 1.888.367.1386

