

# AIB Certificate & Diploma Worksheets

---

## Bank Marketing Diploma

### General Information

Social Security No: \_\_\_\_\_

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Bank: \_\_\_\_\_

This diploma program provides the tools necessary for today's potential bank marketing professionals. Junior level bank marketers, employees with marketing experience but new to banking, employees working in other areas of the bank interested in marketing skills and branch managers responsible for selling their bank's products and services will benefit from taking this comprehensive program.

### Diploma Requirements & Eligibility

To earn a Bank Marketing Diploma all the following criteria must be met:

- Successful completion of all required programs;
- "C" average or better; and
- A grade of A, B, C, or D for all programs of 2 or more credits.

Questions?

Contact Susan Clark at 317-387-9380  
or [sclark@indianabankers.org](mailto:sclark@indianabankers.org)



### Required Programs

You must complete the following courses. Those titles with an asterisk (\*) may be met by transfer credit from an accredited college or university. Each course transferred must be taken for a minimum of 3 credit hours.

<i>Grade</i>	<i>Course</i>
_____	Principles of Banking
_____	Economics for Bankers*
_____	Financial & Business Planning for Bank Marketers**
_____	Marketing Financial Services*
_____	Managing Time at Work
_____	Project Management Fundamentals
_____	Successful Sales Campaigns
_____	Event Based Selling
_____	Dealing Effectively with Co-Workers
_____	Ethical Issues for Bankers

\*\* Financial & Business Planning Principles for Bank Marketing Professional is available only as an AIB Online Course. This course replaces three course requirements for this diploma – Identifying & Leveraging Target Markets, Profitable Accounts and Budgeting for Bank Marketers. Students who have already taken Identifying & Leveraging Target Markets and Profitable Accounts through a Local ABA Training Provider must complete the budgeting lessons of Financial & Business Planning Principles for Bank Marketing Professionals.