



PSI UNIVERSITY FINANCIAL SERVICES INDUSTRY TRAINING CURRICULUM

Level 100 Course Descriptions

The *Inside Financial Services® Curriculum* provides necessary industry fundamentals for professionals with limited knowledge or experience in the financial services industry. The curriculum is comprised of six courses each focusing on a different aspect of the financial services industry. This web-based program allows users to select the course(s) that reflect their specific areas of interest and responsibilities (banking, capital markets or insurance). In addition, users can select a global or US only perspective when learning about the industry. This allows learners to tailor the training to their specific needs and interest.

101: INSIDE FINANCIAL SERVICES – INDUSTRY OVERVIEW

This course introduces the financial services industry, including customer needs met by financial institutions, different types of financial institutions, risks facing financial institutions and techniques used to manage these risks, how financial institutions make money, key industry regulators and additional sources of industry information.

Completion time: 2-2½ hours



102: INSIDE RETAIL BANKING

This course introduces the retail banking segment of the financial services industry, including customer needs met by retail banks, different types of banks and other retail banking institutions, retail banking products and services, retail banking delivery channels, risk management in retail banking and how retail banks make money.

Completion time: 1½-2 hours

103: INSIDE INVESTMENT MANAGEMENT

This course introduces the investment management segment of the financial services industry, including customer needs met by investment management firms, different types of investment management providers, investment management products and services, investment management delivery channels, risk management in investment management and how investment management firms make money.

Completion time: 2-2½ hours

104: INSIDE CORPORATE FINANCIAL SERVICES

This course introduces the corporate financial services segment of the financial services industry, including customer needs met by corporate and investment banks, different types of corporate financial institutions, corporate and investment banking products and services, corporate and investment banking delivery channels, risk management in corporate and investment banking and how corporate and investment banks make money.

Completion time: 2-2½ hours

105: INSIDE LIFE INSURANCE

This course introduces the life insurance segment of the financial services industry, including customer needs met by life insurers, different types of life insurance companies, life insurance products and services, life insurance delivery channels, risk management in life insurance and how life insurance companies make money.

Completion time: 1½-2 hours



106: INSIDE GENERAL (P&C) INSURANCE

This course introduces the general insurance segment of the financial services industry, including customer needs met by general insurers, different types of general insurance companies, general insurance products and services, general insurance delivery channels, risk management in general insurance and how general insurance companies make money.

Completion time: 1½-2 hours



Level 200 Course Descriptions

Performance Solutions International's (PSI) *The Business of...* Level 200 Curriculum of online courses builds on the knowledge learned in our *Inside Financials Services*® (Level 100) Curriculum. The focus of the Level 200 courses is to help learners deepen their strategic and process knowledge in the financial services industry.

It will take a learner between 50 and 90 minutes on average to complete each course. There are check your knowledge exercises throughout the training. Learners can revisit a course at any time to reinforce their knowledge.

THE BUSINESS OF BANKING

201: Business of Retail Banking

This course provides a detailed understanding of the retail banking segment of the financial services industry, including important business processes and current industry challenges. Learners should have a fundamental understanding of the retail banking industry before taking this course.

Completion time: 90 minutes

202: Business of Consumer Payments

This course provides a detailed understanding of the consumer payments segment of the financial services industry, including important business processes and current industry challenges. Learners should have a fundamental understanding of the retail banking industry before taking this course.

Completion time: 90 minutes

203: Business of Treasury Services

This course provides a detailed understanding of the treasury services segment of the financial services industry, including important business processes and current industry challenges. Learners should have a fundamental understanding of the corporate financial services industry before taking this course.

Completion time: 80 minutes



204: Business of Corporate Finance

This course provides a detailed understanding of the corporate banking segment of the financial services industry, including important business processes and current industry challenges. Learners should have a fundamental understanding of the corporate financial services industry before taking this course.

Completion time: 60 minutes

205: Business of Core Banking

The Business of Core Banking covers the business and IT drivers behind core banking modernization and the different approaches banks are taking to address these drivers. Learners should have a fundamental understanding of the retail banking and corporate financial services industry before taking this course.

Completion time: 60 minutes

281: Using Financial Information to Identify Opportunities in the Banking Industry

This course focuses on how to use publicly available financial information to identify opportunities within banking prospects and clients. This course will provide insight into the business mix and strategies within banking institutions.

Completion time: 65 minutes



BUSINESS OF CAPITAL MARKETS

221: Business of Investment Management

This course provides a detailed understanding of the retail brokerage, asset management and private banking segments of the financial services industry, including important business processes and current industry challenges. Learners should have a fundamental understanding of the investment management industry before taking this course.

Completion time: 65 minutes

222: Business of Investment Banking and Trading

This course provides a detailed understanding of the investment banking, proprietary trading and institutional brokerage segments of the financial services industry, including important business processes and current industry challenges. Learners should have a fundamental understanding of the investment management and corporate financial services industry before taking this course.

Completion time: 62 minutes

223: Business of Securities Services

This course provides a detailed understanding of issuer services, broker and advisor services, custody services, as well as industry issues and challenges. Learners should have a fundamental understanding of the investment management industry before taking this course.

Completion time: 61 minutes

282: Using Financial Information to Identify Opportunities in the Capital Markets Industry

This course focuses on how to use publicly available financial information to identify opportunities within capital market prospects and clients. This course will provide insight into the business mix and strategies within capital market firms.

Completion time: 45 minutes



THE BUSINESS OF INSURANCE

241: Business of Life Insurance

This course provides a detailed understanding of the life insurance segment of the financial services industry, including important business processes and current industry challenges. Learners should have a fundamental understanding of the life insurance industry before taking this course.

Completion time: 85 minutes

242: Business of General Insurance

This course provides a detailed understanding of the general (P&C) insurance segment of the financial services industry, including important business processes and current industry challenges. Learners should have a fundamental understanding of the general (P&C) insurance industry before taking this course.

Completion time: 90 minutes

283: Using Financial Information to Identify Opportunities in the Insurance Industry

This course focuses on how to use publicly available financial information to identify opportunities within insurance prospects and clients. This course will provide insight into the business mix and strategies within insurance companies.

Completion time: 70 minutes



CROSS-INDUSTRY COURSES

262: Regulatory Compliance in Financial Services

This cross segment course covers regulations facing the financial services industry today, and the business and IT challenges created by these regulations. This course also addresses key executives and changes in compliance management by financial institutions. Learners should have a fundamental understanding of the particular industry segment before taking this course.

Completion time: 70 minutes

264: The Global Financial Crisis

The Global Financial Crisis course helps you understand the causes, milestones and impacts of the global financial crisis. It reflects recent changes in the industry, including new regulations recently proposed by the Obama administration and EU regulators.

Completion time: 50 minutes

265: Risk Management in Financial Services

This cross segment course covers techniques and IT systems used by financial institutions to manage risk, and current business and IT challenges related to risk management. This course also addresses key executives responsible for risk management and changes in risk management by financial institutions. Learners should have a fundamental understanding of the particular industry segment before taking this course.

Completion time: 70 minutes



Sales Support Descriptions

FINANCIAL ITEMS RELATIONSHIP SUPPORT TOOL (FIRST)

This tool will increase a learner's understanding of financial statements and will help him/her identify an account's business strategy and resulting opportunities for your organization's solutions.

GLOSSARY OF TERMS

A list of financial industry-specific terms and definitions.