



IBF Corporate Training Services



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Overview

Corporate Training Services

Institute of Banking and Finance of Trinidad and Tobago (IBF) conducts open-registration and in-house corporate training across the financial services sector. With 30 years of experience, we are able to draw on our rich network of experienced financial service sector professionals and facilitators to remain one of the preferred choices for quality professional development programmes that are affordable and relevant to our client's needs.

Our corporate training services include, but are not limited to:

- Workshops
- Seminars
- Panel Discussions
- Breakfast Meetings
- In-house training

The IBF also develops and delivers completely customized in-house training upon request to meet your organization's unique development needs.

Financial Planning & Life Goals



Duration: 1 Day

Financial Planning & Life Goals

Overview

This workshop aims to motivate and empower participants to rethink their financial priorities and take charge of their finances. It also aims to assist participants in establishing strategies for the management of current income to guarantee the achievement of retirement goals.

Topics to be discussed:

- Financial Planning
- Physical Health and Well-Being in Retirement
- Psychological, Emotional and Social Adjustments to Retirement

Who should do this Programme?

Persons of all ages who are interested in managing their finances and optimizing their health and quality of life.

Investment Management



Duration: 2 Days

Investment Management

Objective

The aim of this workshop is to provide participants with an introduction to the general principles of investments and an understanding of the investments environment.

At the end of the workshop, participants would:

- Understand the importance of investing.
- Be familiar with the financial markets for investment securities.
- Be familiar with investment product alternatives.
- Be able to assess risk in the context of expected returns.
- Have the basic skills necessary to construct a simple investment portfolio.

Debt Recovery & Delinquency Management



Duration: 2 Days

Debt Recovery and Delinquency Management

Objective

The focus of this workshop will be to provide participants with an overview of the skills necessary for effective debt collection. At the end of the workshop participants would be better equipped to identify problem accounts, conduct a financial means assessment, develop and execute strategies for debt collection, workout and debt restructuring.

Who should do this Programme?

Credit and collection officers/agents and accountants

Credit Analysis & Proposal Writing



Duration: 2 Days

Credit Analysis and Proposal Writing

Overview

This course will offer practical guidelines to assess corporate credit and prepare credit applications for approval. Emphasis will be on the factors that make a good loan or credit facility to minimize risk and losses, the credit evaluation and financial analysis techniques necessary for a successful proposal and the key points the reader/adjudicator of a proposal will look for to make an informed decision. Participants will also have the opportunity to prepare a written credit proposal from start to finish. Day one will provide the tools to construct a logical and viable credit proposal to submit for approval.

Day two focuses on Proposal Writing

At the end of this session participants should have a working knowledge and understanding in preparing a credit proposal. They will also have an appreciation of the qualitative issues that make the presentation helpful and will understand some of the basic tenets of effective proposal writing.

Who should do this Programme?

Credit, Sales and Account Officers.

A-Z Mortgage Financing



Duration: 2 Days

A-Z Mortgage Financing

Workshop Overview

Financing via a mortgage loan is considered to be one of the more secure avenues of retail lending from the lender's perspective. The following topics will be covered in detail over two (2) days: Banking, Legal, Surveyors and Property Tax.

Banking Overview

This Banking Perspective Mortgage Training Workshop segment is specifically tailored to Credit Officers and other related Customer Service Officers in the Financial Services Sector who on a daily basis interact with clients requiring mortgage services. The program covers the qualification requirements and the documentation necessary for mortgage loan processing. Participants will have the opportunity to assess those credit risk elements necessary for good lending decisions. They will also have exposure to those red flags and negative behaviours that lead to mortgage loan delinquency and the measures necessary in such management. Matters such as Bridge Financing, other mortgage refinancing purposes, the Mortgage Market Reference Rate (MMRR) and its application will also be addressed.

Legal Framework of Property Purchase & Mortgage Financing

The A - Z Legal Framework segment of the workshop prepares participants for active engagement in understanding the legal ramifications for obtaining mortgage finance. As a banker, you ought to have a thorough understanding of the legal and procedural aspects of a mortgage. With your added knowledge, you will be better armed to guide potential purchasers with confidence through one of their most important and daunting financial commitments, which they will enter into in their lifetime. This program aims to assist the banks, their officers and customers with avoiding the common pitfalls which arise in these types of transactions.

A-Z Mortgage Financing



Duration: 2 Days

A-Z Mortgage Financing (Cont'd)

Valuators & Surveyor Perspective

Understanding a valuation report of a property is critical to the job of sales, loans and lending officers. Upon completion of this session participants will:

- Have a better understanding of the information contained in a Valuation Report.
- Know some of the steps that are involved in preparing a valuation.
- Appreciate what factors influence value and why.
- Understand the importance of the Valuer and the Quantity Surveyor.

The Property Tax Act: *What You Should Know*

Topics included in this segment will include the following:

- Why Property tax?
- Strengths of Property Tax;
- Obstacles of Property Tax;
- Background of Property Tax;
- Property Tax Information Form;
- Calculations of Property Tax;
- Updates on Property Tax;
- Will values drop due to Property tax?

Anti-Money Laundering/CFT



Duration: 1 Days

Anti-Money Laundering/CFT

Overview

This workshop will identify best practices in compliance to provide a sound understanding of the international developments in AML/CFT within the local context. It will also explore the relevant updates for 2019.

The revised AML/CFT Guidelines provides more detailed guidance on implementation of a risk-based AML/CFT framework. This workshop will cover the following areas:

- Trinidad and Tobago's International Status
- Findings from the Mutual Evaluation Report 2016
- Progress since last Mutual Evaluation Report 2016
- Outstanding items to cure Strategic Deficiencies
- Enforcement Actions:
- Framework Gaps

Who should do this Programme?

- Compliance Officers
- Risk Management Officers
- Financial Professionals
- Accountants
- Legal and Corporate Secretaries

Supervisory Management



Duration: 2 Days

Supervisory Management

Overview

The workshop will expose participants to an enlightened understanding of the role of supervisors, and the requirements for leadership in our current realities. The style and delivery of the program will engender real solutions to the situations experienced by Supervisors in our Caribbean context and provide the tools for continued learning.

Who should do this Programme?

Supervisors and those new to the role.

Selling Skills for Sales Officers



Duration: 2 Days

Selling Skills for Sales Officers

Overview

This training workshop will seek to develop the participants' selling skills, behaviours and confidence to enable them to sell products and services to satisfy clients' needs and to develop long term customer relationships.

Who should do this Programme?

Professionals who address small groups or large audiences in forums which include:

- Sales Officers
- Customer Service Representatives
- Business Development Officers
- Persons who wish to improve their selling skills and client relationships.

Customer Service Training



Duration: 2 Days

Customer Service Training

Overview

To provide participants with essential service skills that maximize customer satisfaction and improve customer loyalty. The workshop will expose participants to an enlightened understanding of their role in the service chain, and build commitment to delivering superior service every time.

Who should do this Programme?

Customer Service Interfacing Professionals

Emotional Intelligence



Duration: 1 Days

Emotional Intelligence: Engaging the Generations

Overview

To promote an understanding of the multi-generational dilemma and promote the use of emotional intelligence to promote engagement and productivity.

Learning Objectives

- To promote an understanding of the generations
- To promote an understanding of emotional intelligence
- To develop emotional intelligence capability
- To implement a personal action plan for impactful emotionally intelligent leadership

Who should do this Programme?

All Professionals.

Managing Stress Effectively



Duration: 1 Days

Managing Stress Effectively

Overview

Today's world and economy has created ever dynamic conditions that promote daily stressors at work and home so that no one is immune to its' effects. Successful leaders and professionals are individuals who have learnt to develop resilience and confidence in dealing with their dynamic environment and employing the right balance of strategies to mitigate the impact of stress. IBF's Managing Stress Successfully workshop will assist in identifying and addressing the key professional and life stressors and suggest appropriate strategies which can be implemented to minimize the harmful effects of stress.

Objective

To address the tools and techniques for managing and performing well under stressful conditions.

Who should do this Programme?

All Professionals.

Public Speaking & Presentation Skills



Duration: 2 Days

Public Speaking and Presentation Skills

Overview

The Public Speaking and Presentation Skills Workshop will introduce specific concepts that are integral for highly effective and impactful public speaking skills and presentations. Participants will learn to overcome their apprehension towards speaking in public. This coupled with additional key skills and strategies will assist participants to organize, structure and create impressive presentations.

Who should do this Programme?

Professionals who address small groups or large audiences in forums which include:

- Management Meetings
- Sales Presentations
- Employee Presentations
- Briefings
- Conferences
- Public Speaking Engagements

Leading at Every Level



Duration: 2 Days

Leading at Every Level: Leadership Program for Managers & Supervisors

Overview

The 21st century leader is required to operate in turbulent times, manage diverse, multigenerational teams, lead with emotional intelligence and deliver superior results to all stakeholders. IBF's leading at every level – leadership program for managers and supervisors is premised on a model that recognizes that the leader is required to operate in three (3) dimensions: Self-Management – Personal Mastery; Managing and Leading Others and Optimizing the Resources Available. Participants will be encouraged to build solutions and construct new realities for action in their own environments and with key stakeholders.

Who should do this Programme?

Supervisors and/or Managers who are transitioning into a leadership role. Human Resource Professionals.

Applied Project Management



Duration: 1 Days

Applied Project Management

Overview

Gain a practical guide to managing projects by understanding project management tools, techniques and strategies in real-time. This workshop will allow participants to apply key principles of project management to an experiential case study. Participants will have the opportunity to demonstrate their knowledge and application needed to effectively manage projects in a simulated project-based environment.

Who should do this Programme?

- Member of Project Management Teams.
- Professionals involved in developing and managing projects.
- Any Professional wanting to gain a better understanding of Project Management.

Women in Leadership



Duration: 2 Days

Women in Leadership

Overview

This program is specifically targeted to women and provides context, support and networking. This program invites you to assess yourself using powerful tools and feedback to reconstruct your leadership paradigm for success. Engage other female leaders to obtain practical insights into leading Caribbean teams and learn how to navigate male dominated organizational politics.

Our Services

The Institute of Banking and Finance of Trinidad and Tobago (IBF) is a non-profit awarding body, established in 1984, to assist the advancement of the banking and finance professionals through its offerings of professional educational programmes and corporate training services.



**1 day & 2 day
Workshops**



**Breakfast
Meetings**



**Panel
Discussions**



**Online
Training**



**Customized training packages to meet your
organization's needs and budget**

Why Train With Us

- We are officially endorsed by the Bankers Association of Trinidad and Tobago to provide educational solutions to the banking & financial services industry.
- Our facilitators are well recognized and qualified within their respective fields.
- We offer a wide range of training topics.
- We serve employees of financial institutions.
- We offer special rates.



Organizations

Some of the numerous organizations that have engaged our corporate training services over the years include:

AIC Financial	Ministry of Works and Transport
Agricultural Development Bank	Mount Pleasant Credit Union
Agricola Credit Union	NAGICO Insurances – Trinidad and Tobago
ANSA Merchant Bank	National Gas Company of Trinidad and Tobago
Bank of Baroda Trinidad Limited	NCB Global Finance Limited
Central Bank of Trinidad and Tobago	Neal and Massy Automotive
Citibank (Trinidad and Tobago) Limited	Neal and Massy (North) Credit Union
Eastern Credit Union Cooperative Society	North West Premium Finance Limited
EXIM Bank of Trinidad and Tobago	Public Service Academy
First Citizens Bank	Rhand Credit Union Cooperative Society
Home Mortgage Bank	RBC Royal Bank (Trinidad and Tobago) Limited
Intercommercial Bank Limited	Republic Bank Limited
Lifestyle Motors Limited	Sagicor
Millennium Finance and Leasing Co. Limited	Scotiabank (Trinidad and Tobago) Limited
Ministry of Community Development	TECU Credit Union
Ministry of Education, Teaching and Teacher Development	The National Entrepreneurship Development Company Limited (NEDCO)
Ministry of Finance	Toyota Trinidad and Tobago Limited
Ministry of Health	Trinidad and Tobago Mortgage Finance Company
Ministry of Labour, Small and Micro Enterprise Development	Trinidad and Tobago Unit Trust Corporation
Ministry of Public Administration	VENTURE Credit Union Co-operative Society Limited

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