



# Tom Martin

**Business/ Credit Union Consultant**  
**CPD Trainer & Course Design**

*The needs of our clients sit at the very heart of our business strategy. We provide expertise and professionalism to deliver tailored outcomes in a cost-effective and efficient manner.*

**WHATEVER YOUR NEEDS, BIG OR SMALL,  
LET OUR EXPERIENCE BECOME YOUR SOLUTION**

## COMPLETE YOUR

- Credit Union Board - Training Plan
- Credit Union Staff - Succession Plan
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- Credit Union Staff - Succession Plan
- CPD requirements - over 20 accredited hours to choose from - see over

## COURSES AVAILABLE

- Selling and Negotiation skills
- Presentation skills
- Product knowledge
- Risk and Compliance
- Management & Supervisory skills
- Telephone sales techniques
- Assertive communications
- Effective communications
- Time management
- Thinking outside the box
- Multi tasking
- Delegation
- Change management
- Sage computerised accounts
- ECDL - all modules



**Mix and match to suit your Credit Unions' needs.**

# CONTINUING PROFESSIONAL DEVELOPMENT COURSES

AS ACCREDITED BY:

Institute of Bankers | Life Insurance Association  
Irish League of Credit Unions

EVENT TITLE	CPD HOURS
Ethics & Governance for Credit Unions - Directors, Supervisors & Staff. (Annual requirement).	1 Hour
Complaint Handling & the Financial Services Ombudsman for Credit Unions - Directors, Supervisors & Staff.	1 Hour
The Personal Insolvency Bill - considerations for Credit Unions - Directors, Supervisors & Staff.	2 Hours
Data Protection for Credit Unions - Directors, Supervisors & Staff.	2 Hours
Anti-Money Laundering with Annual Assessment test - Directors, Supervisors & Staff. (Annual requirement)	2 Hours
Consumer Protection Code 2012 - definition of vulnerable members for Credit Unions - Directors, Supervisors & Staff.	1 Hour
The Succession Act, Inheritance & Nominations for Credit Unions - Directors, Supervisors & Staff.	2 Hours
LP/LS & DBI for Credit Unions - Directors, Supervisors & Staff. (All Operations staff, whether selling Insurance or not, must complete 1 hour of Insurance training)	2 Hours
Lending evaluation, Accounts interpretation and Loan procedural Best Practice for Credit Unions.	4 Hours
The Distressed Borrower - considerations for Credit Unions and Banks	1 Hour
Consumer Credit - considerations for Credit Unions	1 Hour
Assertive Communications - getting the most from your meetings	2 Hours - CU CPD only
The Banknote recycling framework (Required by cash-handlers every 2 years)	1 Hour

NEW CPD COURSES DEVELOPED CONTINUALLY



*Business/Credit Union  
Consultant CPD Trainer  
& Course Design*

**Tom Martin**

MA, LIB, QFA, CUA, CUC, CUG, AMSOE, AMIRTE  
*Certified Mediator*

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