

CLF[®]

Chartered Leadership Fellow[®]
Financial Services and Insurance Leadership

*New Live, Local and Online
Classes Available!
Details Inside!*



Providing You with Knowledge and Skills to Advance into a Leadership Position

The Chartered Leadership Fellow® (CLF®) program has been developed to provide financial services managers, based out of home and field offices, with the knowledge, skills and tools needed to accomplish key organizational goals, such as:

- Recruiting and retaining top performers.
- Developing effective business plans.
- Setting expectations and performance objectives.
- Improving managerial skills.

There are two tracks within the CLF® program, field and office. Each features an effective mix of relevant business curriculum, practical applications and special courses designed to prepare individuals for the challenge of being a leader in a financial services organization.

Field Track

Who is the field track designed for?

The CLF® field manager's program is designed for financial services professionals with three years of experience in managerial roles, such as:

- Regional Vice Presidents
- Managing Partners
- Regional and District Managers
- Field Managers
- Managing Directors
- Sales Managers

This CLF® field track is focused on delivering proven methods and practical applications for field leaders. You will explore the best practices for recruiting and retaining performers, developing effective business plans, setting performance expectations/objectives and improving firm performance. Not only will you increase your own success, you will also be armed with the knowledge to create a culture of success within your organization.

Required Courses (Go to TheAmericanCollege.edu/CLF for individual course descriptions.)

There are a total of seven courses in the program, and the courses can be taken in any order, with the exception of HS 385, which must be taken last.

Integrated Leadership Practices

HS 381 Live, Online Delivery by The American College

or

Essentials of Management Development

HS 371 Local Delivery by GAMA

or

Professional Patterns of Management

HS 381 Local Delivery by Kinder Brothers

Field Leadership Series Workshops

HS 372 Local Delivery by GAMA

or

Practice Management Concepts for Agency Managers

HS 373 Self-Study

Leadership in a Changing World

HS 382 Self-Study

Interpersonal Relationships in the Workplace

HS 383 Self-Study

Creative Problem Solving and the Strategic Planning Process

HS 384 Self-Study

Capstone: Leading the Marketing Organization of the Future

HS 385 Residency

Field Management Practices

HS 386 2 DVD Webcasts



Office Track

Who is the office track designed for?

The CLF® office program is designed for financial professionals with the following level of experience and responsibilities:

- Home office supervisors or managers with 3-5 years of experience
- Agency office managers who seek more in-depth managerial and leadership knowledge and skills

Individuals who pursue the office CLF® track will learn theory and best practices for: leadership development, interpersonal relationships, problem solving, human resource management, employee recruitment and current issues within the insurance and financial services profession. The courses will help you create a culture of success in your business.

Required Courses (Go to TheAmericanCollege.edu/CLF for individual course descriptions.)

There are a total of six courses in the program. The first five courses can be taken in any order. The capstone course (HS 388) must be taken last. If you have completed all but your last self-study course and are enrolled in that course, you may enroll for and attend the capstone course.

Leadership in a Changing World

HS 382 Self-Study

Interpersonal Relationships in the Workplace

HS 383 Self-Study

Creative Problem Solving and the Strategic Planning Process

HS 384 Self-Study

Marketing Management of Financial Services

HS 387 Self-Study

Human Resource Management

HS 389 Self-Study

Capstone: Leading the Marketing Organization of the Future

HS 388 Integration of previous courses in case study format

HS 388 Course Description

This capstone course focuses on the critical need to help today's managers become tomorrow's leaders. It integrates tools and techniques from previous CLF® courses to help managers analyze their current operations, create a customized organization and develop implementation plans.

The course is delivered as a self-study case review. Students will read and analyze cases designed to integrate the concepts from the previous course.



The Leader in Financial Services Education

The American College is a nonprofit educational institution with the highest level of academic accreditation, dedicated to leadership in innovative training and development for financial services professionals.

The College is distinguished by resources of the highest quality, innovation in program delivery and design and results that create sustainable advantages for our customers.

Serving as a valued business partner to banks, brokerage firms, insurance companies and others for over 83 years, The American College has assembled a faculty of the foremost thought leaders in the industry to help companies and their associates succeed.



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The American College is accredited by the Middle States Commission on Higher Education, 3624 Market Street, Philadelphia, PA 19104, (215) 662-5606.

Tuition and Fees

Tuition includes all required study materials, access to convenient online learning tools and an examination.

Field Track

Admission Fee: \$130.00
(one-time, non-refundable fee for new enrollees at The College)

Course Tuition: \$675.00*
HS 386: \$250.00

Capstone Tuition: \$1,820.00

Shipping and Handling:
\$25.00 (per course)

*For special-format courses
(HS 371/372/381/386) tuition varies.*

**For self-study courses
(HS 373/382/383/384)*

Office Track

Admission Fee: \$130.00
(one-time, non-refundable fee for new enrollees at The College)

Course Tuition: \$675.00*

Capstone Tuition (HS388W): \$675.00

Shipping and Handling:
\$25.00 (per course)

**For self-study courses
(HS 382/383/384/387/389)*

Contact our CLF® Administration for special-format course pricing:
Phone: 610-526-1419; Fax: 610-526-1359

Required courses and their pricing may be subject to change; please refer to our website, TheAmericanCollege.edu, for the most current information.

PACE The CLF® program is subject to the PACE Recertification Program. Go to TheAmericanCollege.edu/PACE for more information.

How to Register for Your CLF®

Register for all programs at The American College in one of three easy ways!

Phone

Call Gerry Herbison, Monday–Friday 9am–5pm ET at 610-526-1419

Mail or Fax

Complete the course registration found online and return it via mail or fax. Our fax number is 610-526-1359

Online

Create your user account and register for your course at TheAmericanCollege.edu