



**American
Institute of
Banking**



American Institute of Banking

**Professional Training
From the American Bankers Association**

AIB Marketing Financial Services

AIB Course Code: 7740

Course Length: 16 weeks

Course Description:

Marketing Financial Services looks at what motivates customers to purchase financial services and teaches you how to develop a successful marketing plan.

Audience:

All bank personnel responsible for conceiving or carrying out any phase of a bank's marketing efforts, including bank personnel in customer-contact and operations positions, management trainees, and persons entering banking at the mid-management level.

Learning Objectives:

After successfully completing this program, you will be able to:

- Describe the stages in the marketing planning process
- List the four elements of the marketing mix as they apply to the marketing of bank services
- Recognize consumer motivation and buying behavior
- Identify key issues or strategies relating to banking products and the pricing, promotion and distribution of bank services
- Integrate public relations, advertising, sales promotion, selling, and service distribution functions in your bank's overall marketing plan
- Conduct situation analysis and formulate a master marketing strategy

Textbook: *Marketing Financial Services*, 7th Edition, 2009, ABA

Course Credits: AIB: 3.0

ACE College Credit Recommendation:

In the lower division baccalaureate/associate degree category, 3 semester hours in Banking or Bank Marketing

Prerequisites:

None

Required Software:

Adobe Acrobat Reader; Microsoft Internet Explorer Browser 7.0 or Mozilla Firefox 2.0 or higher

Texas Bankers Association
203 W. 10th Street
Austin, TX 78701

Phone: (512) 472-8388
Fax: (512) 473-2560
aib@texasbankers.com



**American
Institute of
Banking**



American Institute of Banking

Professional Training From the American Bankers Association

How AIB Online Courses Work: The instructor will guide you through each lesson and will be available to answer questions and provide feedback on your assignments. Each week you will receive an assignment over the Internet. The assignment will include:

- Reading a chapter in your textbook (mailed to you prior to the start of a 10 or 16 week course) or online course material (for 5 week seminars). The textbook cost is included in the tuition.
- Completing a short assignment and either forwarding the assignment electronically to your instructor or posting it on the electronic class Discussion Board.
- Taking a self-check test.

In addition, you also will have some assignment where you will collaborate with other students using electronic discussion boards, chat rooms and e-mail. Students do not necessarily have to be online at a specific time each week; however, assignments must be completed on a timely basis.

Examinations: The semester length course (10-16 weeks) will have mid-term and final examinations. The 5-week seminars have a final examination only. Your overall grade for the class will be based on your performance on the weekly assignments and examinations.

Texas Bankers Association
203 W. 10th Street
Austin, TX 78701

Phone: (512) 472-8388
Fax: (512) 473-2560
aib@texasbankers.com



AIB Online Course Student Registration Form

REGISTRANT INFORMATION

Mr. Ms.

Name _____ SS # _____

Title _____ Bank/Company _____

Bank Street Address _____ PO Box _____

City _____ State _____ Zip _____

Email _____ Phone _____ Fax _____

COURSE SELECTION

COURSE TITLE	CATALOG #	START DATE	PRICE

Invoice (TBA members only)

Check enclosed (make checks payable to Texas Bankers Association)

Note: Add a \$30 priority processing fee to registrations received by TBA **within 10 business days** of the class start date.

Credit card registration is available online for TBA members.
 Please go to: www.texasbankers.com
 and click on the Professional Development Calendar under the Education tab.

Please complete and fax or mail to:
 Texas Bankers Association
 P.O. Box 2569
 Austin, Texas 78768-2569
 512-472-8388 phone • 512-473-2560 fax



Cancellations/Refunds

Refunds will be made (less \$100 cancellation fee) if received within 10 business days from the start of course and the return of the textbook, if applicable. Please include your packing slip or order number with the return of your textbook. You may request a transfer only once with a fee of \$100.00. There are no refunds for cancellations received more than 10 business days after the start of the class.