



ACCOMPLISHED AGENT/ADVISOR

LIFE INSURANCE & ANNUITIES

Understanding the Older Client
(TACHS 350)

Health and Long-term Care Financing for Seniors
(TACHS 351)

Financial Decisions for Retirement
(TACHS 352)

[Earn CASL Designation]

[Consider CAP philanthropy designation]

[Consider MSFS master's degree]

HEALTH & EMPLOYEE BENEFITS

Planning for Retirement Needs
(TACHS 326)

Executive Compensation
(TACHS 342)

OR

Compensation & Personnel Management
(TACHS 343)

[Earn REBC designation]

Long-Term Care Professional

[Earn LTCP designation] *(AHIP)*

Disability Healthcare Professional

[Earn DHP designation] *(AHIP)*

HIPAA Professional

[Earn HIPAAP designation] *(AHIP)*

Managed Healthcare Professional

[Earn MHP designation] *(AHIP)*

MULTI-LINE

Financial Planning: Process & Environment
(TACHS 300)

Fundamentals of Insurance Planning
(TACHS 311)

Fundamentals of Estate Planning
(TACHS 330)

Income Taxation
(TACHS 321)

Investments
(TACHS 328)

Planning for Retirement Needs
(TACHS 326)

Estate Planning Applications
(TACHS 334)

The Financial System in the Economy
(TACHS 322)

[Earn ChFC designation]

Individual Life Insurance
(TACHS 323)

Life Insurance Law
(TACHS 324)

Planning for Business Owners & Professionals
(TACHS 331)

[Earn CLU designation]

FINANCIAL ADVISING & INVESTMENTS

Qualified Retirement Plans
(TAC)

Advanced Estate Planning I
(TAC)

Mutual Funds: Analysis, Allocation & Performance Evaluation
(TAC)

Attend First of Two MSFS Residencies:

- Financial Statement Analysis
(TAC)
- Interpersonal Leadership Skills
(TAC)
- Security Analysis & Portfolio Management
(TAC)
- Personal Tax Planning
(TAC)
- Executive Compensation
(TAC)



Any 2 Electives from the Following List:

- Financial Institutions
(TAC)
- Business Valuation
(TAC)
- Advanced Estate Planning II
(TAC)
- Business Succession Planning I
(TAC)
- Business Succession Planning II
(TAC)
- Tools of Charitable Giving
(TAC)
- Charitable Giving Applications
(TAC)
- Charitable Giving: Managing the Tools, the Applications & the Relationships
(TAC)



Attend Second of Two MSFS Residencies:

- Communications & Research
(TAC)
- MSFS Case Study Project
(TAC)
- Ethics and Human Values
(TAC)

[Earn MSFS master's degree]

[Consider CAP philanthropy designation]

PRACTICE MANAGEMENT

Succession Planning
(NAIFA)

NAIFA Sales System (Online sales skills development program with /coaching support)
NAIFA Leadership Training: Leadership in Life Institute (LII)

KEY

Courses are offered through:

NAIFA – National Association of Insurance and Financial Advisors

TAC – The American College

AHIP – America's Health Insurance Plans