



EARLY-CAREER AGENT/ADVISOR

LIFE INSURANCE & ANNUITIES

NAIFA: Introduction to the Insurance and Financial Services Industry (DVD)

Techniques for Prospecting: Prospect or Perish (TAC-FA 200)

Techniques for Exploring Personal Markets (TAC-FA 201)

Techniques for Meeting Client Needs (TAC-FA 202)

Ethics for the Financial Services Professional (TAC-FA 290 – CBT self-study /program)

Essentials of Annuities (TAC-FA 256)

Essentials of Life Insurance Products (TAC-FA 257)

OR

Essentials of Business Insurance (TAC-FA 251)

[Earn LUTCF designation]

HEALTH & EMPLOYEE BENEFITS

NAIFA: Introduction to the Insurance and Financial Services Industry (DVD)

Techniques for Exploring Personal Markets (TAC-FA 201)

Techniques for Meeting Client Needs (TAC-FA 202)

Ethics for the Financial Services Professional (TAC-FA 290 – CBT self-study program)

Disability Income Insurance (TAC-FA 211)

Long-Term Care Insurance (TAC-FA 255)

[Earn LUTCF designation]

MULTI-LINE

NAIFA: Introduction to the Insurance and Financial Services Industry (DVD)

Techniques for Prospecting: Prospect or Perish (TAC-FA 200)

Techniques for Exploring Personal Markets (TAC-FA 201)

Techniques for Meeting Client Needs (TAC-FA 202)

Ethics for the Financial Services Professional (TAC-FA 290 – CBT self-study program)

Essentials of Life Insurance Products (TAC-FA 257)

Essentials of Business Insurance (TAC-FA 251)

[Earn LUTCF designation]

FINANCIAL ADVISING & INVESTMENTS

NAIFA: Introduction to the Insurance and Financial Services Industry (DVD)

Techniques for Prospecting: Prospect or Perish (TAC-FA 200)

Techniques for Exploring Personal Markets (TAC-FA 201)

Techniques for Meeting Client Needs (TAC-FA 202)

Ethics for the Financial Services Professional (TAC-FA 290 – CBT self-study program)

Foundations of Financial Planning: An Overview (TAC-FA 262)

Foundations of Financial Planning: The Process (TAC-FA 263)

[Earn FSS designation]

PRACTICE MANAGEMENT

NAIFA: Introduction to the Insurance and Financial Services Industry (DVD)

Survive and Thrive in Your First Three Years (NAIFA)

Hiring the Ideal Assistant (NAIFA)

Six Steps to an Effective Referral Conversation (NAIFA)

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

KEY

Courses are offered through:

NAIFA – National Association of Insurance and Financial Advisors

TAC – The American College