



ESTABLISHED AGENT/ADVISOR

LIFE INSURANCE & ANNUITIES

Financial Planning: Process and Environment (TACHS 300)

Fundamentals of Insurance Planning (TACHS 311)

Individual Life Insurance (TACHS 323)

Life Insurance Law (TACHS 324)

Fundamentals of Estate Planning (TACHS 330)

Planning for Business Owners and Professionals (TACHS 331)

Income Taxation (TACHS 321)

Investments (TACHS 328)

[Earn CLU designation]

HEALTH & EMPLOYEE BENEFITS

Group Benefits (TACHS 325)

Advanced Topics in Group Benefits (TACHS 340)

Advanced Topics in Managed Care (TACHS 344)

[Earn RHU designation]

Health Insurance Associate

[Earn HIA designation] (AHIP)

Disability Income Associate

[Earn DIA designation] (AHIP)

Employee Healthcare Benefits Associate

HIPAA Associate

[Earn HIPAAA designation] (AHIP)

MULTI-LINE

Foundations of Risk Management, Insurance & Professionalism (CPCU 510)

Insurance Operations, Regulation, & Statutory Accounting (CPCU 520)

The Legal Environment of Risk Management & Insurance (CPCU 530)

Finance for Risk Management & Insurance Professionals (CPCU 540)

Financial Services Institutions (CPCU 560)

Commercial Concentration:

Commercial Property, Risk Mgt. & Insurance (CPCU 551)

Commercial Liability, Risk Mgt. & Insurance (CPCU 552)

Survey of Personal Risk Mgt., Insurance & Financial Planning (CPCU 553)

OR

Personal Concentration:

Personal Risk Mgt. & Property-Liability Insurance (CPCU 555)

Personal Financial Planning (CPCU 556)

Survey of Commercial Risk Mgt. & Insurance (CPCU 557)

[Earn CPCU designation]

FINANCIAL ADVISING & INVESTMENTS

Financial Planning: Process & Environment (TACHS 300)

Fundamentals of Insurance Planning (TACHS 311)

Income Taxation (TACHS 321)

Planning for Retirement Needs (TACHS 326)

Investments (TACHS 328)

Fundamentals of Estate Planning (TACHS 330)

PRACTICE MANAGEMENT

Succession Planning (NAIFA)

Hiring the Ideal Assistant (NAIFA)

Six Steps to an Effective Referral Conversation (NAIFA)

[Take a review course and sit for CFP comprehensive exam, if desired—also requires a four-year degree.]

OR

[In addition to the above core courses, select two from the following to earn the ChFC designation:]

The Financial System in the Economy (TACHS 322)

Financial Planning Applications (TACHS 332)

Estate Planning Applications (TACHS 334)

Financial Decisions for Retirement (TACHS 352)

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

CPCU – American Institute for CPCU