

Early-Career Agent / Advisor



Life Insurance & Annuities	Health & Employee Benefits - Endorsed by AHIA	Multi-Line	Financial Advising & Investments	Practice Management
Orientation to the NAIFA Professional Development System	Orientation to the NAIFA Professional Development System	Orientation to the NAIFA Professional Development System	Orientation to the NAIFA Professional Development System	Orientation to the NAIFA Professional Development System
Industry Overview [CBT self-study seminar]	Industry Overview [CBT self-study seminar]	Industry Overview [CBT self-study seminar]	Industry Overview [CBT self-study seminar]	Practice Management Overview [CBT self-study seminar]
Techniques for Prospecting: Prospect or Perish (TAC - FA 200)	Techniques for Prospecting: Prospect or Perish (TAC - FA 200)	Techniques for Prospecting: Prospect or Perish (TAC - FA 200)	Techniques for Prospecting: Prospect or Perish (TAC - FA 200)	Establishing Goals & Objectives for Success
Techniques for Exploring Personal Markets (TAC-FA 201)	Techniques for Exploring Personal Markets (TAC-FA 201)	Techniques for Exploring Personal Markets (TAC-FA 201)	Techniques for Exploring Personal Markets (TAC-FA 201)	Protecting Your Business: E&O Insurance
Techniques for Meeting Client Needs (TAC-FA 202)	Techniques for Meeting Client Needs (TAC-FA 202)	Techniques for Meeting Client Needs (TAC-FA 202)	Techniques for Meeting Client Needs (TAC-FA 202)	Basics of Financial Management
Ethics for the Financial Services Professional (TAC-FA 290 - CBT self-study program)	Ethics for the Financial Services Professional (TAC-FA 290 - CBT self-study program)	Ethics for the Financial Services Professional (TAC-FA 290 - CBT self-study program)	Ethics for the Financial Services Professional (TAC-FA 290 - CBT self-study program)	Time Management
Essentials of Annuities (TAC-FA 256)	Disability Income Insurance (TAC-FA 211)	Essentials of Life Insurance Products (TAC-FA 257)	Foundations of Financial Planning: An Overview (TAC- FA 262)	
Essentials of Life Insurance Products (TAC-FA 257)	Long-Term Care Insurance (TAC-FA 255)	Essentials of Business Insurance (TAC-FA 251)	Foundations of Financial Planning: The Process (TAC-FA 263)	
OR Essentials of Business Insurance (TAC-FA 251)	[Earn LUTCF designation]	[Earn LUTCF designation]	[Earn FSS designation]	
[Earn LUTCF designation]				

NAIFA Prospecting, Marketing & Sales System Series - Level I (TBA)
[includes web-based sales & marketing tools and mentor/coach component]
 Leadership Training: Leadership in Life Institute (LILI)