



# 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 - ENDORSED BY AHIA

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)

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Six Steps to an Effective Referral Conversation (NAIFA)  
**[Fall 2009]**

**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