

COURSE DESCRIPTIONS

Understanding IRAs

As an investment professional, Individual Retirement Accounts (IRAs) are a natural place to start helping your clients with retirement planning. The IRA is a powerful tax-advantaged investing tool that helps clients retire in dignity. There are several types of IRAs as of 2020: traditional IRAs, Roth IRAs, SEP IRAs, and SIMPLE IRAs. This series gives you a better understanding of IRA types and some of the decisions your clients may face in planning for retirement.

Ethical Considerations for Life & Death

On completing this course, producers will understand the importance integrating insurance products into the lives of clients and helping them with investing as part of their financial strategy, planning, and preparation for their futures. Agents will see how personal and professional ethics and ethical practices help agents reach their goals with integrity, as well as review continuing education requirements, new state laws, new federal laws and Acts introduced, which influence the insurance industry.

Life Insurance Today

This course takes a comprehensive look at life insurance and how it can be a means of attaining financial security during life and after death. It explains the many applications of life insurance products and how their flexibility allows them to cover a wide range of clients' needs.

NEW! Strategic Retirement Planning

Most people want to continue to live in retirement as they did while working. Long-term financial and retirement security is a work in progress. This course provides a holistic view of retirement planning as a lifelong pursuit for clients and the strategies, techniques and products available to make this a successful endeavor. It begins with what individuals can do to plan for retirement outside of their employment, followed by planning opportunities within their employment, as well as opportunities for those who might also be business owners.



CREDIT VALUES: UNDERSTANDING IRAS

REGISTRY	CREDITS	ETHICS	REGISTRY	CREDITS	ETHICS
CFP Board	9	0	Mississippi	11	0
CIMA	16	0	Missouri	8	0
CLU/ChFC	16	0	Montana	16	0
CRPC	16	0	Nebraska	12	0
CRPS	16	0	Nevada	24	0
Alabama	7	0	New Hampshire	24	0
Alaska	11	0	New Jersey	20	0
Arizona	16	0	New Mexico	20	0
Arkansas	11	0	New York	15	0
California	14	0	North Carolina	15	0
Colorado	24	0	North Dakota	13	0
Connecticut	8	0	Ohio	16	0
Delaware	20	0	Oklahoma	20	0
Florida	17	0	Oregon	8	0
Georgia	24	0	Pennsylvania	16	0
Hawaii	20	0	Rhode Island	20	0
Idaho	20	0	South Carolina	20	0
Illinois	12	0	South Dakota	10	0
Indiana	17	0	Tennessee	24	0
Iowa	24	0	Texas	15	0
Kansas	12	0	Utah	12	0
Kentucky	12	0	Vermont	16	0
Louisiana	12	0	Virginia	20	0
Maine	24	0	Washington D.C.	16	0
Maryland	12	0	West Virginia	12	0
Massachusetts	13	0	Wisconsin	20	0
Michigan	24	0	Wyoming	20	0
Minnesota	20	0			



CREDIT VALUES: ETHICAL CONSIDERATIONS FOR LIFE AND DEATH

REGISTRY	CREDITS	ETHICS	REGISTRY	CREDITS	ETHICS
CFP Board	12	0	Missouri	16	0
CIMA	17	0	Montana	17	0
CLU/ChFC	17	0	Nebraska	15	2
Alabama	15	2	Nevada	15	2
Alaska	15	2	New Hampshire	15	2
Arizona	15	2	New Jersey	15	2
Arkansas	15	2	New Mexico	15	2
California	17	0	New York	15	0
Colorado	15	2	North Carolina	15	2
Connecticut	15	2	North Dakota	15	2
Delaware	15	2	Ohio	17	0
Florida	17	0	Oklahoma	15	2
Georgia	15	2	Oregon	15	2
Hawaii	17	0	Pennsylvania	17	0
Idaho	15	2	Rhode Island	15	2
Illinois	12	0	South Carolina	17	0
Indiana	17	0	South Dakota	10	0
Iowa	17	0	Tennessee	17	0
Kansas	17	0	Texas	11	1
Kentucky	17	0	Utah	9	3
Louisiana	15	2	Vermont	17	0
Maine	15	2	Virginia	15	2
Maryland	15	2	Washington	14	2
Massachusetts	17	0	Washington D.C.	15	2
Michigan	15	2	West Virginia	17	0
Minnesota	17	0	Wisconsin	15	2
Mississippi	15	2	Wyoming	15	2



CREDIT VALUES: LIFE INSURANCE TODAY

REGISTRY	CREDITS	ETHICS
CFA	24	0
CFP Board	16.5	0
CLU/ChFC	30	0
CRPC	37	0
Alabama	12	0
Arizona	22	0
Arkansas	15	0
California	26	0
Colorado	31	0
Connecticut	30	0
Delaware	12	0
Florida	24	0
Georgia	37	0
Hawaii	20	0
Idaho	24	0
Illinois	12	0
Indiana	12	0
Iowa	18	0
Kansas	12	0
Kentucky	12	0
Maine	37	0
Maryland	16	0
Massachusetts	18	0
Michigan	31	0
Minnesota	15	0
Mississippi	12	0

REGISTRY	CREDITS	ETHICS
Missouri	16	0
Montana	9	0
Nebraska	35	2
Nevada	37	2
New Hampshire	21	0
New Jersey	24	0
New Mexico	24	0
North Carolina	22	0
North Dakota	15	0
Ohio	20	0
Oklahoma	14	0
Oregon	8	0
Pennsylvania	40	0
Rhode Island	24	0
South Carolina	24	0
South Dakota	12	0
Tennessee	24	0
Texas	12	0
Utah	12	0
Vermont	22	0
Virginia	12	0
Washington	9	1
Washington D.C.	16	0
West Virginia	18	0
Wisconsin	24	0
Wyoming	24	0



CREDIT VALUES: STRATEGIC RETIREMENT PLANNING

REGISTRY	CREDITS	ETHICS
CFP Board	15.5	0
CLU/ChFC	15.5	0
CRPC	15.5	0
Alabama	13	0
Alaska	13	0
Arizona	13	0
Arkansas	13	0
California	13	0
Colorado	13	0
Connecticut	13	0
Delaware	13	0
Florida	13	0
Georgia	13	0
Hawaii	13	0
Idaho	13	0
Illinois	12	0
Indiana	13	0
Iowa	13	0
Kansas	13	0
Kentucky	13	0
Maine	13	0
Maryland	13	0
Massachusetts	13	0
Michigan	13	0
Minnesota	13	0
Mississippi	13	0
Missouri	13	0

REGISTRY	CREDITS	ETHICS
Montana	13	0
Nebraska	13	2
Nevada	13	2
New Hampshire	13	0
New Jersey	NA	0
New Mexico	13	0
New York	15	0
North Carolina	13	0
North Dakota	13	0
Ohio	13	0
Oklahoma	13	0
Oregon	13	0
Pennsylvania	13	0
Rhode Island	13	0
South Carolina	13	0
South Dakota	10	0
Tennessee	13	0
Texas	12	0
Utah	12	0
Vermont	13	0
Virginia	12	0
Washington	13	1
Washington D.C.	13	0
West Virginia	13	0
Wisconsin	13	0
Wyoming	13	0

