FSEdNet Course Outline

The Cornerstones of Financial Services Discipline

Cornerstones of Financial Services Discipline Preview

Five Essentials of Success

Prospecting – Part One

The Pre-Approach, The Approach and Fact Finding – Part Two

Obtaining Referrals – Part Three

It's Your Business

Three B's of Marketing

Four Levels of a Consumer

Belief in the Products

Establishing the Disciplines of Success

Establishing the Disciplines of Success Part One

Establishing the Disciplines of Success Part Two

Building to Significance – 5 Daily Steps

Building to Significance - 5 Daily Steps Part One

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Overview of the Need for Life Insurance

Series Preview

Who Needs Life Insurance – Singles

Who Needs Life Insurance – Single Parents

Who Needs Life Insurance – Married with No Children

Who Needs Life Insurance – Married with Children

Who Needs Life Insurance – Children

Who Needs Life Insurance – Empty Nesters

Who Needs Life Insurance – Retirees

Who Needs Life Insurance – Special Needs Children

Overview of Just Life Changes Series

Series Preview

Just Graduated – So Why Do They Need Life Insurance

Just Got Married – So Why Do They Need Life Insurance
Just Had a Baby – So Why Do They Need Life Insurance
Just Got a New Job – So Why Do They Need Life Insurance
Just Got Divorced – So Why Do They Need Life Insurance
Just Bought a New House – So Why Do They Need Life Insurance
Just Started a New Business – So Why Do They Need Life Insurance
Just Received a Substantial Asset – So Why Do They Need Life Insurance
Just Widowed – So Why Do They Need Life Insurance
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Prospecting Series

Series Preview
Basics of Prospecting Kissing Frogs
Understanding the
Basic Prospecting Terminology & Sources – Part One
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Opportunities Are Found Within the Relationship
How to Find Networking Opportunities
Prospecting - How to Build Relationships - Part One
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Understanding Referrals – Part One
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How to Use Newsletters to Grow Your Practice

The Target Market Series

Series Preview
Target Market Concepts
Defining and Understanding Target Markets

Center of Influence Series

Series Preview
Understanding Centers of Influence
Working with Centers of Influence

Millennials and Baby Boomers Serving Each Other

Elevator Talk Series

Series Preview
Understanding and Building an Elevator Talk
What Do You Do? The Elevator Talk

Establishing Telephone Habits for Success

Series Preview
Understanding the Telephone Calls in Business
Telephone Habits Which Deliver More Appointments – Part One
Telephone Habits Which Deliver More Appointments – Part Two
Tips to Improve Telephone Results
Best Practices for Telephone Success

Time Management Success

Series Preview
Understanding Time Management
Time Management Concepts and Practices
Proven Time Management Techniques
Stop Procrastinating!!

Guiding Principles and Habits for Success

Understanding Underwriting

Underwriting Best Practice
How a Cover Letter Helps in Underwriting
The Basics of Reinsurance

The Important of First Impressions and Business Etiquette Series

Series Preview
Making a Positive First Impression
Five Situations to Improve How People See You - Part One
Five Situations to Improve How People See You - Part Two
Understanding Proper Business Etiquette – Part One
Understanding Proper Business Etiquette – Part Two

Benefits of Joint Field Work

The Benefits of Working on a Team

Opportunities in Mentoring Series

Series Preview
Overview of Mentoring
Benefits of Mentoring
Roles and Responsibility of the Mentor – Part One
Roles and Responsibility of the Mentor – Part Two
Roles and Responsibility of the Mentee – Part One
Roles and Responsibility of the Mentee – Part Two
The Benefits of Reverse Mentoring
Preparing for a Sales Call

Show Me – Preparing for Sales Call
Show Me – Debrief After a Sales Call

Handling Objections Series
Series Preview
Understanding Objectives
Fundamental Principles for Handling Objections
Different Techniques for Handling Objections – Part One
Different Techniques for Handling Objections – Part Two
Understanding Objections When Calling for Appointments
You Made a Sale – Now What?

Using Video Conference to Improve Service
Series Preview
Overview of Video Conferencing
Understanding Video Conferencing Etiquette

Professional Policy Delivery
Professional Policy Delivery – Overview
Professional Policy Delivery – Preparing for the Delivery
Professional Policy Delivery – At the Delivery & Rated Policies

Millennials and Baby Boomers Serving Each Other

Establishing a Commitment to Service Series
Series Preview
Overview of Importance of Service
Service Resources and Beneficiaries
Additional Sales Opportunities Through Service
Understanding the Playing Field & Avoid Surprises

The Goal Setting Series
Series Preview
The Importance of Goal Setting
The Three Secrets to Effective Goal Setting
Why You Need a Plan
The Self-Assessment Process
Establishing Your Financial Goals
Building Your Future with Each Day’s Activity
Two Sets of Goals – Part One
Two Sets of Goals – Part Two

Online Detective Series
Series Preview

Introduction to Online Detective Series
Online Detective – Building a Prospect's Profile
Online Detective – Putting the Online Detective to Work

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Series Preview
Overview of the Insurance Industry
Overview of How Insurance Companies are Organized
LIMRA's Facts and Figures of Life Insurance

Role of Life Insurance Series

Series Preview
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Role of Life Insurance Valuing Human Life
Protecting Against Common Types of Risks
Overview of Term Life Insurance
Overview of Permanent Insurance – Part One
Overview of Permanent Insurance – Part Two
Overview of Long Term Care and Disability Income

Overview of Savings and Investing

Series Preview
Overview of Savings and Investing
Overview of Financial Products – Tolerance & Safety
Overview of Financial Products – Risk & Reward
Overview of Macroeconomics and Inflation – Part One
Overview of Macroeconomics and Inflation – Part Two
Microeconomics – Is It Important?
Overview of Setting Saving and Investment Goals
The Impact of Inflation on Savings and Investment Accounts
Understanding the Basics of Savings and Investments Taxation
Calculating How Tax Basics Work
Overview of the Various Cash Equivalent Choices
Introduction to Mutual Funds

Understanding the Fundamentals of Mutual Funds
Overview of Exchanged Traded Funds – Part One
Overview of Exchanged Traded Funds – Part Two
Introduction to Annuities
Overview of Simple and Compound Interest
Overview of Equity Investments
Overview of Debt Investments and Corporate Bonds
Overview of Debt Investments – Government Bonds
Overview of Debt Investments – Municipal Bonds
Overview of Prospectus

Overview of Personal Financial Series

Series Preview
Overview of Earned and Unearned Income
Overview of Personal Financial Statements –Part One
Overview of Personal Financial Statements –Part Two
Deciphering Your Paycheck
Overview of Budgeting Made Simple
Overview of Making Budget and Sticking to it
Understanding Bankruptcy

Overview of Social Security Series

Series Preview
History and Numbers Behind Social Security
What is Social Security?
What Do Those Numbers on Your Social Security Card Mean?
Your Social Security Earning Statement
Better than Average – The Break Even Age – Part One
Better than Average – The Break Even Age – Part Two
How Much Do You Receive from Social Security
Overview of the 99% Problem
Overview of How to View Your Benefit
Overview of Spousal Benefits
Overview of Survivor Benefits
Overview of Working While Receiving Benefits
Overview of Divorced Spouse Benefits
Overview of Disability Benefits

Focus on Social Security Series

- Series Preview
- Overview of Why Social Security Guidance Matters
- Social Security Chained CPI
- Social Security Magic Number
- Desperately Required Cash
- FICA
- The Right Points to Make a Point
- Social Security Benefit Arbitrage
- Woman and Social Security Benefits
- Overview of Social Security Fast Facts

Understanding Medicare

- Series Preview
- Introduction to Medicare and Part A
- Understanding Medicare Part B
- Overview of Medicare Part C
- Understanding Medicare Part C
- Overview of Medicare Part D
- Understanding Medicare Part D
- Understanding Medicare “Don’t Miss the Window”
- Overview of Medigap Insurance
- Overview of Various Medigap Plans
- Medicare Advantage Plan or Medigap Insurance
- Medicare or Medicaid
- Medicare is Only a Band-Aid
- Choices for Medicare Coverage

Overview of Long Term Care Series

- Series Preview
- Overview of Long Term Care Series
- Overview of Long Term Care
- Overview of Providers of Long Term Care
- What is Long Term Care and Who Can Provide Help
- Long Term Care and Medicare and Medicaid
- Long Term Care for Me
- Long Term Care and Formulating a Plan
- What Should a Long Term Care Policy Include

Is Long Term Care Tricky?
Choosing a Long Term Care Policy

Overview of Annuities Series

Series Preview
What is an Annuity?
Overview of Fixed Annuities
Overview of Variable Annuities
Overview of Fixed Annuities
Understanding the Split Annuity Strategy
How Annuities are Taxed – Part One
How Annuities are Taxed – Part Two
How Annuities are Taxed – Part Three
Overview of Annuities and 1035 Exchange
Overview of Annuities Out of the Box

Overview of Contract Beneficiary Designation Series

Series Preview
Understanding Beneficiaries Series Overview
Overview of the Pitfalls of Beneficiary Designations
Overview of Problematic Beneficiaries – Life Insurance Policy
Problematic Beneficiary Designations – Annuity Contracts

Understanding the Life Insurance Policy Series

Series Preview
Understanding 1035 Exchanges
Understanding Insurable Interest
Understanding Contestable and the Incontestability Clause
The Life Insurance Policy is a Legal Contract
Understanding More Legal Aspects and Policy Provisions
So Who Died First?

Understanding Whole Life and Universal Life Insurance Policies Series

Introduction to Whole Life Insurance
Participating and Non-Participating Whole Life Insurance
Overview of Universal Life Insurance

Understanding Index Insurance Product Series

- Series Preview
- Overview of Index Insurance Products
- Overview of Pitfalls of Index Products
- Overview of Indexed Universal Life
- Overview of Indexed Annuities
- Overview of Index Life's Taxes, Fees and Charges

Overview of Disability Income Series

- Series Preview
- What is Disability Income Insurance?
- Who Should Have Disability Insurance?
- Types of Disability Income Insurance
- Your Occupation and Disability Insurance
- Terminology to Know and Understand Disability Income Insurance
- Overview of Meanings of Occupations
- Overview of Group vs. Individual Disability Income Insurance
- Overview of Key Person Disability Insurance
- Overview of Business Buyout Disability Insurance

Overview of College Planning Series

- Series Preview
- Overview of Is College Worth It?
- What Could a College Education Cost?
- How in the World Can I Pay for a College Education?
- Other Ways to Pay the Higher Education Cost – Part One
- Other Ways to Pay the Higher Education Cost – Part Two

Overview of Individual Taxation Series

- Series Preview
- Introduction to the Individual Income Tax System
- The Graduated Income Tax System
- Income Tax Compliance
- Understanding Tax Filings and Tax Deductions
- Understanding Tax Credits and Tax Schedules
- State and Local Income Taxes
- Why Review a Client's Tax Return
- Why Do I Need to Know Taxes?

Understanding How Taxes Affects the Products You Sell

Overview of IRAs Series

Series Preview

Introduction to Individual Retirement Accounts

Overview of the Tax Man Cometh But Once

Overview of Traditional IRAs

Overview of Roth IRAs – Part One

Overview of Roth IRAs – Part Two

Overview of Inherited IRAs – Part One

Overview of Inherited IRAs – Part Two

Overview of Stretch IRA Strategy

Overview of Custodial IRAs

Overview of SEP IRAs

Overview of SIMPLE IRAs

Overview of IRA Transfers and Rollovers

Overview of Pension Plan Series

Series Preview

Overview of Qualified Retirement Plans

Overview of ERISA and Plan Characteristics

Overview of Defined Contribution and Defined Benefit Plans – Part One

Overview of Defined Contribution and Defined Benefit Plans – Part Two

Overview of 401(k) Plans

Overview of 403(b), 457 and Federal Thrift Savings Plans

Overview of Self Employed Retirement Plans

The 6 Pillars of a Successful Retirement Plan

Overview of Distribution and Rollover Rules

Overview of Individual Multi-Line Products and Services Series

Series Preview

Overview of Individual Automobile Insurance Coverage – Part One

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Selecting the Proper Form of Home Protection

Single Family Homes and Condominium Owner's Coverage

Understanding Homeowner's Additional Coverage

Understanding High Risk Homeowner's Insurance Coverage

Monday Morning Benefit Series

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Overview of Trusts

Overview of Life Insurance in Estate Conservation

Overview of Required Distributions

Overview of Estate Tax Planning Series

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Introduction to Estate Tax Planning

Overview of How a Property Passes at Death

Overview of Estate Tax Limits

Overview of Usage of Trusts in Estate Tax

Overview of Creating Tax-Exempt Wealth

Overview of Generation Skipping Tax and Trusts

Overview of the Power of Annual Gifts

Overview of Charitable Giving

Overview of Discounting of Assets

Overview of Qualified Domestic Trusts

Understanding Special Needs Series – Coming Soon

Understanding the Financial Impact of Divorce Series – Coming Soon

Overview of Planning Strategies for Retirement Series

Series Preview

Overview of Planning for Retirement

Overview of Sources of Income

Overview of What Risks Lie Ahead

Overview of Projecting Future Expenses

Overview of Projecting Future Income Needs

Overview of Projected Income Shortfall

Overview of Planning Strategies at Retirement Series

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Overview of Income Transition
Overview of Managing Large Sums of Money
Understanding Overview of Retirement Expenses
Overview of Retirement in the Go-Go Years
Overview of Life During the Slow-Go Years
Overview of Life During the No-Go Years – Part One
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Overview of Planning Strategies for Widowhood Series
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Overview of Challenges During Widowhood
Overview of Life Expectancy and Lifestyle
Overview of Care Provided by Family
Overview of Care Options When You Are Alone
Overview of Living Happily Ever After

Generational Buying Differences for Financial Services Series
Series Preview
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Overview of Generation X
Overview of Generation Y
Conclusion and Summary of Generational Buying Differences

Different Buying Patterns and Habits Between Men and Women Series
Series Preview
Different Buying Patterns and Habits Between the Genders – Part One – The Buying Mentality
Different Buying Patterns and Habits Between the Genders – Part Two – Spending and Deciding
Different Buying Patterns and Habits Between the Genders – Part Three – Moving Men and Women to Buy

Overview of Working with Business Owners Series
Series Preview
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Overview of Dealing with and Understanding Small Business Owners
Overview of the Small Business Marketplace
Overview of Life Insurance in the Business Market
Overview of Financial Statements

Overview of Different Business Structures Series
Series Preview

Overview of Business Etiquette
Business Structure of Sole Proprietorship
Overview of the Partnership Structure
Overview of Corporations – Understanding "C" Corps
Overview of Corporations – Liability and Taxation
Overview of Sub Chapter S Corporations
Overview of Limited Liability Corporations – LLCs
Overview of Professional Service Corporations – PSC

Overview of Managing Business Risks Series

Series Preview
Overview of Risks Facing Business Owners
Overview of Buy Sell Agreements
Overview of Buy Sell Arrangements for Sole Proprietors
Overview of Buy Sell for Partnerships and Corporations
Overview of Funding for Buy Sell Arrangements
Overview of Key Man Coverage
Overview of Disability Risk for Business
Overview of Estate Planning Issues for Business Owners

Overview of Executive Benefit Plan Series

Series Preview
Overview of Non-Qualified Retirement Plans
Overview of Executive Bonus Plans
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Overview of Deferred Compensation Plans
Overview of Funding a Non-Qualified Executive Plan
Overview of Choosing a Non-Qualified or Qualified Plan

Overview of Commercial Multi-Line Products

Series Preview
Business Owner's Package Policy
Selective Multi-Peril Policies and Floaters
Commercial Umbrella Coverage
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Commercial Auto Coverage
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Overview of the Basics of Investing Series

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Overview of Macroeconomics
Understanding the Impact of Inflation on Investments
Understanding Investment Goals Basics
Understanding Tax Basics of Investing
Understanding the Risks of Investing
Understanding Capital Gains
Understanding Diversification
Understanding Simple and Compound Interest
Understanding Different Types of Accounts
Overview of Managed Accounts
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Understanding Various Portfolio Costs
Understanding Primary and Secondary Markets
Understanding Factors Which Affects Interest Rates
Understanding a Sample Investment

Overview of Mutual Funds Series

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Overview of Mutual Funds – Introduction
Fundamentals of Mutual Funds
Understanding the Prospectus – Part One
Understanding the Prospectus – Part Two
The Mathematical Components
Understanding “The Expenses” of Mutual Funds
Understanding Distribution of Mutual Funds
Understanding Fund Managers
A, B, C’s of Mutual Funds
Overview of the Balanced Mutual Fund
Overview of the Fixed Income Mutual Fund
Overview of the Index Mutual Fund
Overview of the Equity Mutual Fund
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Overview of the Fund of Funds Mutual Fund

Mutual Funds Deciding Between Load or No-Load Mutual Funds – Part One
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Understanding Mutual Fund Earnings
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Setting an Investment Strategy
Understanding the Advantages of Dollar Cost Averaging
Determining Appropriate Asset Allocation
Understanding Asset Allocation – Part One
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Overview of Investment Choices Series

Understanding Cash Equivalents
Understanding Banking – Savings & Checking Accounts
Understanding Banking – Certificates of Deposits (CD's)
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Overview of Financial Products - Tolerance & Safety
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Overview of Exchanged Traded Funds (ETF) – Part One
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Overview of Equity Investments
Overview of Small, Mid, Large Cap Stock Differences
Overview of the Buying and Selling of Stocks
Understanding Growth Stocks
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Overview of Debt Investments and Corporate Bonds
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Overview of Variable Annuities Series

What is a Variable Annuity
How Does a Variable Annuity Work?
Features and Benefits of Variable Annuities
Understanding Living Benefit Option
Costs and Charges of Variable Annuities
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Investment Options of Variable Annuities
Understanding 1035 Exchanges for Variable Annuities

Understanding Variable Annuity's Bonus Credits

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Overview of Managed Money Accounts
Understanding Terminology and Definitions of Managed Accounts
The Pro's and Con's of Managed Accounts
Summary of the Various Types of Managed Money Accounts
Why Investors Liked Managed Accounts
Overview of Wrap Accounts
Overview of IMA – Investment Management Accounts
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Managed Accounts vs. Mutual Fund Accounts
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Overview of Investment Analysis Series

Understanding the Lingo of Investing
Introduction to Income Statement Analysis – Ratios
Introduction to Income Statement Analysis – Deprecation
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Measuring Investment Risk - Alpha, Beta & R-Squared
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A Representative's Consideration

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A Representative's Approach to Investing
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