

Insurance Professional Development



Strong Training Drives Performance!

Kaplan's Insurance Professional Development Library's full array of training courses meets the needs of new employees and seasoned professionals. We'll provide comprehensive orientations to introduce employees to new roles, as well as more specific, job-related education to help them develop throughout their careers.

Kaplan's Insurance Professional Development training will inspire your staff to achieve success!

Kaplan Financial Education's Professional Development gives you three ways to learn!

You can choose:

- › Targeted just-in-time learning with individual courses
- › Open library of courses with Total Access PD
- › Designed curriculum packages to advance staff through their careers

Build a Career with Our New Professional Development Curriculums!

Kaplan's Insurance Professional Development Library is great for your just-in-time training needs, but its value is magnified through our new Professional Development Curriculums, which offer:

- › Curriculums designed and packaged by experts in the field to get staff up and running quickly and advance them in their careers
- › Portal functionality to allow training administrators to monitor students' progress through the program
- › A customized completion certificate you can use to recognize the career achievement of employees who have completed all three levels of a curriculum (Basic, Intermediate, and Advanced)

96+

courses in PD library

73

years of commitment to helping individuals achieve their goals

“I've been using Kaplan Financial Education for three years and have found it perfect for my needs. The variety of topics and the ease of use makes it fun enough that I'll often do lots of extra courses just for more knowledge. I recommend it often to colleagues who each say the same. Kudos for a great service!”

—B. Cyrus, Advisor

Your staff benefits from:

- › Just-in-time learning of relevant insurance topics
- › An interactive experience that uses illustrations, graphs, and practice questions to facilitate the learning process
- › The convenience of studying at their own pace



Insurance Professional Development



ANTI-MONEY LAUNDERING

- AML Best Practices for the Life Insurance Industry[†]
- AML Laws and Practices
- AML Training Program for Life Insurance Agents[†]

BUSINESS SKILLS

- Delivering Quality Service*
- Effective Business Writing for Insurance People

ESTATE PLANNING

- Estate Planning Concepts
- ILITs and Estate Planning[†]
- Problematic Beneficiary Designations
- Understanding Wills and Intestacy[†]

HEALTH INSURANCE

- Disability Income Insurance
- Group Insurance
- Health Care Reform[†]
- Health Concepts
- Health Savings Accounts
- Long-Term Care Coverage Combined with Annuities and Life Insurance

ETHICS

- Ethical Insurance Producer
- Ethical Practices*
- Ethics
- Ethics at Work
- Ethics for P/C Professionals
- Insurance Ethics and Consumer Protection
- Suitability For Annuities[†]
- Suitability For Traditional Life and UL Insurance[†]

INVESTMENTS AND FINANCIAL PLANNING

- Annuities for Today's Investor
- Annuity Concepts*
- Asset Allocation
- Asset Allocation in Variable Annuities[†]
- Business Continuation Training Course
- Equity-Indexed Annuities
- Financial Planning Process Course
- Financial Products Training Course[†]
- Indexed Products[†]
- Section 529 Plans[†]
- Taxation of Life Insurance and Annuities[†]
- Understanding 1035 Exchanges[†]
- Variable Contracts
- Variable Contracts: Case Studies[†]

LIFE INSURANCE

- Introduction to Advanced Markets[†]
- Introduction to Life Insurance
- Life Concepts
- Life Insurance in Action
- Life Insurance Policy Comparison and Underwriting

PROPERTY-CASUALTY BASICS

- Legal Concepts & Doctrines*
- Property-Casualty Concepts*
- Property-Casualty Principles*
- Reinsurance Basics*
- Risk Management[†]
- Umbrella Liability Coverage*
- Underwriting Basics*

PROPERTY-CASUALTY: CLAIMS

- Auto Physical Damage Basics*
- Claim Basics*
- Claim Evaluation & Settlement*
- Claim Investigation*
- Claim Statements*
- Insurance Fraud Awareness*
- Interpreting Medical Reports*
- Liability Insurance Practices
- Medical Tests & Signs*
- Negotiation Skills*
- Residential Construction Basics*

PROPERTY-CASUALTY: COMMERCIAL LINES

- Business Income Coverages*
- Commercial Auto Coverage*
- Commercial Auto Rating*
- Commercial Crime Coverage*
- Commercial General Liability Coverage*
- Commercial General Liability Rating*
- Commercial Inland Marine Coverage*
- Commercial Property Coverage*
- Commercial Property Rating*
- Insurance Packages for Small Businesses*
- Product Liability Insurance
- Workers Compensation Coverage
- Workers Compensation Rating

PROPERTY-CASUALTY: PERSONAL LINES

- Dwelling Coverage
- Flood Insurance
- Homeowners 2000 Coverage*
- Personal Auto Coverage*
- Personal Auto Rating
- Personal Inland Marine Coverage*
- Personal Lines Endorsements

REFERENCE TOOLS (PRINT BOOKS ONLY)

- Glossary of Insurance Terms
- Medical Claims Illustrated Handbook

RETIREMENT PLANNING

- 401(k) Plans
- Advanced Planning for Senior Needs
- Determining Retirement Income Needs[†]
- Distribution Planning: Required Distributions[†]
- Financial Challenges Facing Retirees[†]
- Investing Retirement Assets
- Medicare
- Medicare & Medigap Insurance
- Principles of Retirement Planning
- Qualified & Non-Qualified Plans
- Retirement Income Strategies[†]
- Senior Needs Planning
- Social Security & Medicare
- Understanding IRAs

Ask About Our Expertly
Packaged Curriculums

Auto Claims
Underwriting Personal Lines
Advanced Markets
Financial Planning
Retirement Planning and Senior Needs

Call 877-731-5071 for curriculum details

For Select Titles Only (see library for eligible titles)

| K | Total Access PD | Online Solution | Online Solution with Print Book | Print Book Only | Print Book with Print Exam* | Print Book with PDF Exam* |
|---------------|------------------------------------|-----------------|---------------------------------|-----------------|-----------------------------|---------------------------|
| | \$59 365 days to entire library | \$29 per course | \$39 per course | \$29 per course | \$49 per course | \$39 per course |
| Online Course | ● | ● | ● | | | |
| Online Exam | ● | ● | ● | | | |
| Print Book | | | ● | ● | ● | ● |
| Print Exam* | | | | | ● | |
| PDF Exam* | | | | | | ● |

*Titles eligible for print exams | [†]Online only course | Training Directors must contact customer service for self-grading answer key.