Put Yourself on the Path to Success with the new

NAIFA LUTCF®

NAIFA's LUTCF® designation is a new state-of-the-art curriculum developed for NAIFA by the College for Financial Planning. Registration opens January 2015. Classes begin July 2015.

Effective & Efficient: Courses are just nine weeks long!

The new LUTCF® combines dynamic online and classroom learning with field training to equip you with the knowledge and skills to advise on real-life issues of today.

Courses are taught via an interactive web-based platform or in a live classroom setting. Field activities allow you to gain hands-on experience engaging clients in a live setting. Each of the three courses includes eight weeks of instruction followed by a week for study, review, and an exam. The program can be completed in one year or less!

Gain new knowledge, skills and confidence in four practice specialties

Based on the results of an extensive job analysis survey process and input from industry experts, the new LUTCF® covers four practice specialties:

- Life insurance and annuities
- Health and employee benefits
- Multiline
- Financial advising and investments

Plus--practice management.

The new LUTCF® is right for you if you identify with one or more of the following:

- You are new to the industry and are looking to develop fundamental prospecting, selling and practice management skills plus working knowledge of the four practice specialties.
- You are a financial professional seeking a broad understanding of the insurance industry and how it can impact financial planning and advising.
- You are insurance agency or home office staff seeking a comprehensive overview and an understanding of the business aspects of the industry.

“I am very excited about the new LUTCF® designation program and can't wait to begin enrolling our advisors!”

– Paul Wetmore, MBA, LUTCF®

AVP, Product Liaison and Regional Field Marketing Teams, MetLife Premier Client Group and NAIFA LUTCF® Advisory Group Member

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EDUCATING THE NATION'S TOP FINANCIAL ADVISORS

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LUTCF® Designation Program Overview

Course One – Introduction to Life Insurance and Practice Fundamentals

- Developing a Business Plan
- Financial Planning and Risk Management
- Ethics
- Introduction to Life Insurance Products
- Prospecting for Life Insurance
- Life Insurance Selling Skills
- Study, Review, and Exam

Course Two – Insurance and Investment Products

- Life Insurance and Annuities
- Annuities and Mutual Funds
- Disability Income Insurance
- Long Term Care Insurance
- Property & Casualty Insurance
- Health Insurance
- Group Insurance Products
- Study, Review, and Exam

Course Three – Risk Management Applications

- Retirement Planning
- Estate Planning
- Applications for Individuals
- Special Family Situations
- Applications for Business Owners
- Case Study 1 – Individual Client Scenario
- Case Study 2 – Business Owner Scenario
- Study, Review, and Exam

PROGRAM PRICING:

NAIFA Member: $782 per course / $1,985 for bundled program package, online webinar only

Non-Member: $920 per course / $2,335 for bundled program package, online webinar only

NOTE: Prospective designees will be required to be NAIFA members at the time of conferment.

To learn more, visit http://www.cffpinfo.com/lutcf

or contact the College for Financial Planning Enrollment Department at 800-237-9990 x3

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