



NAIFA-INDIANA CONTINUING EDUCATION COURSES

LIFE INSURANCE & ANNUITIES

Annuities for Accumulation and Distribution –

(Approved for 1 hour Indiana continuing education)

In this program, Tim Kiesling identifies the most efficient ways to make your income work for you. In Annuities for Accumulation and Distribution Tim shows an in depth knowledge of the different types of annuities and how they can be used as a tool to aid in retirement income. He explains the difference between variable, fixed, and index annuities as accumulation tools and clarifies the benefits of income annuities during the distribution phase. (Timothy Kiesling, CLU, ChFC, RICP, CRPC)

Final Expense Insurance –

(Approved for 1 hour Indiana continuing education)

In this presentation, Brenda Doty explains what final expense insurance covers and details the benefits of having it. In Final Expense Insurance, Brenda describes how this type of insurance provides coverage for end of life expenses connected to funeral costs and other unexpected expenses. While most people do not like to contemplate the need to prepare for funeral and burial expenses, covering these expenses is an important part of personal estate planning. Brenda illustrates this presentation with experiences she has shared with clients. This presentation is applicable to all practice specialties – life insurance and annuities, multi-line, health and employee benefits, and financial advising and investments. (Brenda Doty, LUTCF, RHU, CLU, CPC)

Understanding Living Benefits: Life Insurance Benefits for the Living

(Approved for 1 hour Indiana continuing education)

This program is presented by Michael T. Smith, LUTCF, President of CPS Horizon Financial Group, an independent brokerage firm that focuses on helping agents and financial planners find quality companies and products for their clients. In this presentation Mike coaches you on life insurance you don't have to die to use. He discusses the various living benefits associated with life insurance plans and how to determine which plan is best for your client. He also presents real life situations where quality of life was maintained because of living benefits. (Michael T. Smith, LUTCF)

The Top 5 Life Insurance Plans Every Insurance and Financial Professional MUST Know!

(Approved for 1 hour Indiana continuing education)

In this program, Nick Paleveda and Max Coulliette break down five of the most valuable life insurance plans that are available to consumers. They discuss how much insurance is needed based on various income levels. Additionally, Nick and Max talk about the important role taxes play in life insurance plans. Learning Objectives: 1. Find out how much life insurance you actually need. 2. Learn about the living benefits offered by certain policies. 3. Understand the asset protection benefits of a Fully Insured Defined Benefit plan. (Nicholas Paleveda and Maxwell Coulliette)

HEALTH & EMPLOYEE BENEFITS

Life Is Just A Cash Flow

(Approved for 1 hour Indiana continuing education)

The importance of selling disability insurance begins and ends with income planning, yet we have a nation of people who have protected all of their assets except their most valuable asset – their income. Many people financially are better prepared to die than to live. This program will explain how to use motivation, emotion and strategy to make selling disability insurance an integral part of your daily business. (Mark Petersen and Ryan Petersen- 2011)

The Evolution of Asset Based LTC Solutions

(Approved for 1 hour Indiana continuing education)

This program will provide advice for agents to assist insureds when filing a claim for disability insurance coverage and will highlight the differences of individual coverage versus group long-term disability coverage. (David Bryant)

FINANCIAL ADVISING & INVESTMENTS

Fully Insured Defined Benefit Pension Plans

(Approved for 1 hour Indiana continuing education)

In Fully Insured Defined Benefit Pension Plans Nick Paleveda and Max Coulliette of National Pension Partners discuss why business owners need qualified retirement plans and expand on the intricacies of these plans. Nick and Max present an in depth discussion of the various types of retirement plans that are available. They explain the intricacies of fully insured pension plans and compare their benefits to that of a 401k plan. They also examine defined benefit plans and review the tax opportunities that are available with each plan. (Nicholas Paleveda, MBA, J.D., LL.M and Max Coulliette, CFP, CLU, ChFC)

The Cornucopia of Retirement Plans

(Approved for 1 1/2 hour Indiana continuing education)

In this presentation Nick Paleveda and Max Coulliette of National Pension Partners present an in depth discussion of the various types of retirement plans that are available. They explain the intricacies of fully insured pension plans and compare their benefits to that of a 401k plan. They also examine defined benefit plans and review the tax opportunities that are available with each plan.

(Nicholas Paleveda, MBA, J.D., LL.M and Max Coulliette, CFP, CLU, ChFC)

Using Home Equity in Retirement

(Approved for 1 hour Indiana continuing education)

In this presentation Colleen Rideout discusses strategies homeowners can use to maximize and protect their current investments. She explains the revised FHA HECM program which is designed to last throughout a retirement lifespan. Additionally, Colleen clarifies how to use a reverse mortgage and compares the benefits of using a reverse mortgage versus a traditional mortgage. (Colleen Rideout)

Using Trusts as IRA Beneficiaries

(Approved for 1 hour Indiana continuing education)

In this program, IRA distribution planning expert Jeffery Levine will explore using trusts as IRA beneficiaries. Attendees will gain an understanding of IRA trusts and how they work, the advantages and disadvantages associated with IRA trusts and how to avoid many of the costly IRA trust mistakes made by clients that can destroy their retirement accounts. (Jeffrey Levine)

Eight Secrets of the Top Performing Agents - Part 1 and Part 2

(Approved for 2 hours Indiana continuing education)

In these two programs, speaker, author and trainer Bill Whitley shares insights learned from interviews with top multiline agents that have been translated into actionable steps you can utilize immediately to grow your practice. Advance from quoting home and auto to advising clients in a more holistic way. Close more sales and develop deeper and long lasting client relationships by mastering these tips and techniques. (Bill Whitley)

PROSPECTING, MARKETING, SALES & PRACTICE MANAGEMENT

Engage at Every Age

(Approved for 1 hour Indiana continuing education)

How to Form Deep Client Relationships with Every Generation in Your Practice: This program explores the various reasons why advisors have difficulty retaining assets across generations and the key difference between generational groups. Anne provides tips on how to help your cross-generation client retention and aspects to consider when relating to generations other than your own. (Anne Loehr)

The Problem with Penguins: How to Dramatically Increase the Revenues of Your Financial Services Business by Branding & Packaging Your Big Idea

(Approved for 1 hour Indiana continuing education)

Learn about the “penguin” problem and seven branding and packaging techniques that advisors can use right away to attract, meet and close more high-quality clients. (Bill Bishop)

ETHICS

(Approved for 3 hour Indiana continuing education and satisfies the Indiana ethics requirement)

This program is available in a three-hour session and is presented by Robin Mueller.

Ethics: Hour One

In Ethics: Hour One, Robin examines the myriad definitions of good ethics and reasons behind state mandated ethics classes. Additionally, Robin shares personal stories regarding ethical conduct.

Ethics: Hour Two

In Ethics: Hour Two, he discusses the importance of suitability. Robin also talks about the “imperfect storm”, a common situation involving seniors and vulnerable adults.

Ethics: Hour Three

In Ethics: Hour Three, Robin discusses ten case studies involving ethical conduct and instructs the class to break up into small groups to discuss them. (Robin Mueller)

The Top Five Ethical Challenges Facing Producers Today

(Approved for 1 hour Indiana continuing education)

This program is an overview of the ethical challenges of product knowledge, misrepresentation, disclosures, selling products vs. providing overall planning, and compliance complexity. (Panel discussion)

Long Term Care – 5-hour recertification course

(Approved for 5 hours LTC Indiana continuing education)

This course is required to renew the Long Term Care license every license renewal period.

(Updated 4/14/2021)