

LIFE AND HEALTH ESSENTIALS

15 CE credits each course (all license types), Part One includes 1 Ethics credit

Two days for each course, 8 a.m. – 4:30 p.m. each day

\$225 member (IIAT or TAIFA)/\$450 nonmember each part



Protect your customers and maximize sales with IIAT's Life and Health Essentials series. Designed to meet the needs of IIAT members as well as members of the Texas Association of Insurance and Financial Advisors, this program delivers the basics and much more about life, health and disability products.

Part One

Insuring Individuals and Families

- Life values and life stages
- Life, health and disability products for families
- Assessing client needs
- Regulations and ethics
- Taxation issues
- How life products and government programs can work together to serve your customer
- Insuring seniors with long-term care, supplements and annuities
- Investment products for individuals

Part Two

Insuring Employers and Employees

- Employee benefit planning
- Retirement and pension programs including 401(k)s
- HMOs and other group health programs
- Coordinating government and group benefits
- Group life and disability
- Minimizing costs while maximizing employer profits
- Annuities – what they are and how they work

Students who pass the exams at the end of part one and part two will meet the technical education requirement for the ACSR designation in life and health.

Attention Life and Health Managers

- This program is invaluable for producing a well-trained service staff that allows salespeople to do what they do best—sell
- Recognize your service staff's achievements with ACSR

Attention P&C Managers

- P&C agencies can expand their capabilities and serve customers with alternative products
- Personal lines service staff will get the basics they need to capitalize on opportunities to cross-sell life and health products

The Road to ACSR

The Life and Health Essentials course, for many, is the first step in pursuit of the Accredited Customer Service Representative designation. For more information on obtaining the ACSR designation, contact IIAT or visit iiat.org.

Education



**Independent
Insurance
Agents of Texas**



CITY

DATE

LOCATION

PHONE

PART ONE

DALLAS

Oct. 19 & 20

Addison Conference Center
15650 Addison Road

972.450.6200

HOUSTON

Oct. 7 & 8

Norris Conference Center
9990 Richmond Ave., S. Bldg., Ste. 102

713.780.9300

PART TWO

DALLAS

April 29 & 30

Addison Conference Center
15650 Addison Road

972.450.6200

HOUSTON

Feb. 9 & 10

Norris Conference Center
9990 Richmond Ave., S. Bldg., Ste. 102

713.780.9300

4 WAYS TO REGISTER

ONLINE: iiat.org

PHONE: Call 800.880.7428, 8 a.m.–5 p.m. Monday through Friday to register with credit card.

FAX: Dial 512.469.9512 any time and charge registration to credit card.

MAIL: Mail registration form to: IIAT, P.O. Box 142363, Austin, TX 78714-2363.

2010 LIFE & HEALTH ESSENTIALS REGISTRATION

Course Code: LHE17-1/LHE17-2

(Copy this form to register additional students)

Name IIAT Member

TDI #..... TAIFA Member

Agency IIAT and TAIFA Member

Mailing address

City/State/ZIP

e-mail..... Phone (.....).....

Class (check all that apply) Part 1 Date: City:

Part 2 Date: City:

Tuition (each part) \$225 each member (IIAT or TAIFA)/\$450 each nonmember

Check payable to IIAT enclosed for \$_____ Please check Discover Visa MC AMEX

Credit card # Expiration date ____/____

Name on card Signature

Return to: IIAT, P.O. Box 142363, Austin, TX 78714-2363