



COLLEGE FOR  
FINANCIAL PLANNING®  
A KAPLAN COMPANY

# The Life Underwriter Training Council Fellow<sup>SM</sup>

LUTCF®



Are you ready to take your career to the *next level*?

The College has discount agreements with hundreds of firms and trade organizations. Contact us to find out if you qualify.

(or w/ NAIFA Member Discount)

## Life Underwriter Training Council Fellow<sup>SM</sup> (LUTCF®)

**Founded by NAIFA in 1984, the LUTCF® program is designed to help new insurance agents master prospecting, selling, and practice management skills.**

The LUTCF® or Life Underwriter Training Council Fellow<sup>SM</sup> professional designation program is the insurance industry's premier educational program to help agents acclimate to their new career. More than 62,000 LUTCF® designations have been conferred since 1984. In February of 2014, the College for Financial Planning and NAIFA partnered to create an all-new version of the LUTCF®. Thanks to direct collaboration with several top insurance companies, the program was redesigned with the industry's needs in mind.

**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.

## Why should I enroll in the LUTCF® Program?

- The LUTCF® is the **gold standard for insurance industry credentials** and is the perfect way to begin your new career.
- Develop skills that **apply directly to your current position**. More than half of students in the class typically attribute a sale as a result of their first homework assignment.
- The program **qualifies for State Insurance CE as well as CE** for other industry credentials.

\*Full program enrollment only available for the online version of the LUTCF® program.

 **VISIT:** [www.kaplanfinancial.com/wealth-management/fraternals](http://www.kaplanfinancial.com/wealth-management/fraternals) for additional information.

**kaplanfinancial.com | 800.660.0437**

MKT-014695



## How the program works:

The LUTCF® Program is available via classroom-study or the College's exclusive online education platform. Our platform features traditional study materials and online coursework that bring the classroom to your home or office. The program includes HD videos, eBooks, live online classes, practice quizzes, and optional printed study materials.\* All coursework utilizes real-world client situations and case studies to illustrate planning techniques instantly applicable to your practice.

**Students have a full year to complete each course in the program, but typically finish in 2-3 months.**

## Enrollment includes:

- Hours of **high-quality video lectures** that can be streamed or downloaded.
- Optional **live instructor-led online classes** with interactive Q&A sessions.
- **eReader study materials** viewable on PCs, tablets, and mobile devices.
- An **interactive student portal** with access to practice quizzes and exams.



**LUTCF**



## Full topic list:

### Professional Designation Program

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

### Professional Designation Program

- 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
- Review & Examination

### Insurance and Investment Products

- Life Insurance and Annuities
- Annuities and Mutual Funds
- Disability Income Insurance
- Long Term Care Insurance
- Property & Casualty Insurance
- Health Insurance
- Employer-Based Insurance Products
- Review & Examination

## Transfer Credit

Fraternal Insurance Counselor (FIC) and Fraternal Insurance Counselor Fellow (FICF) designation holders are eligible for transfer credit toward the LUTCF® program. Information on these programs and eligible transfer credit can be found at <http://www.kaplanfinancial.com/professional-development/fraternals>

\*Printed materials are an additional \$40 per course and are available at any time.