

# NEW— Financial Services Specialist Designation (FSS)



## How This Program Will Help You Succeed

### ■ Sales training that teaches you:

- “What to say, how to say it, and when to say it”
- Basic planning concepts and needs in the personal financial services market
- Effective communications skills
- Target marketing
- Prospecting for new clients
- Making sales presentations

### ■ Planning Fundamentals, including:

- Estate planning
- Financial planning
- Investment planning
- Retirement planning
- Senior planning

### ■ Products and Services, including:

- Annuities
- Business insurance
- Disability income insurance
- Employee benefits
- Life insurance

## Enhance Your Clients' Financial Security

The American College and the National Association of Insurance and Financial Advisors (NAIFA) are pleased to introduce the new Financial Services Specialist (FSS) designation. Developed specifically for financial planning professionals and their support staff, the FSS provides you with the tools and skills for career success and advancement. It also helps you keep pace with industry changes and assist clients with financial security needs through:

- High-impact sales training
- Essential product knowledge
- Planning fundamentals
- Ethics training

## Live Weekly Classes

FSS courses are delivered in classrooms using qualified moderators and a study-group approach that incorporates role-playing, sales planning projects, action projects, readings, and examinations. Select courses are also available online. The American College is marketing the FSS program in conjunction with the National Association of Insurance and Financial Advisors (NAIFA).

The American College works with local NAIFA volunteers, as well as agency managers, to organize and deliver classes at any time throughout the year. Classes are open to all interested producers and financial services professionals locally.

## Interested?

Please speak with your local NAIFA chair or visit [www.theamericancollege.edu/fss](http://www.theamericancollege.edu/fss) and we will contact you with more information on how to join a class.



THE  
**AMERICAN**  
COLLEGE  
THE LEADER IN FINANCIAL SERVICES EDUCATION



## Required FSS Courses

To earn the FSS designation, you must complete six courses as follows. Visit [www.theamericancollege.edu](http://www.theamericancollege.edu) for more information including course descriptions and availability, as well as examinations and other course completion requirements.

### Required Core Courses (3)

- 262 Foundations of Financial Planning: An Overview (July 2005)
- 263 Foundations of Financial Planning: The Process (October 2005)
- 290 Ethics for Financial Services Professionals (self-study course; available now)

### Elective Courses (Select 3)

#### Sales Skills Techniques

- 201 Techniques for Exploring Personal Markets
- 202 Techniques for Meeting Client Needs
- 203 Techniques for Building a Career in Financial Services (2007)

#### Planning Foundations

- 261 Foundations of Retirement Planning
- 264 Foundations of Investment Planning (2006)
- 271 Foundations of Estate Planning
- 281 Foundations of Senior Planning

#### Product Essentials

- 211 Essentials of Disability Income Insurance
- 222 Essentials of Multiline Insurance Products (February 2006)
- 251 Essentials of Business Insurance
- 252 Essentials of Employee Benefits
- 255 Essentials of Long-Term Care Insurance
- 256 Essentials of Annuities
- 257 Essentials of Life Insurance Products

*NOTE: If you currently hold the LUTCF designation, you may receive the new FSS designation upon completion of 262, 263, and 290 in addition to one elective course from the other course offerings, provided that you have not used the elective course to qualify for the LUTCF designation. If you completed an ethics course while earning the LUTCF, you do not need to complete 290.*

## Earning Credit

If you have successfully completed any Huebner School course with the exception of a CLF course, you will be allowed credit for one elective toward the LUTCF or the FSS designation program. This credit may be applied only once—that is, it cannot be used for both the LUTCF and the FSS. Further, upon successful completion of either the LUTCF or the FSS program, you may obtain credit for one elective course in either the CLU, ChFC, RHU or REBC programs. This provision may be applied once only—that is, it cannot be used for both the LUTCF and the FSS designation program. For more information, contact Student Services.

## Program Completion

To earn the FSS designation, you must formally apply to The College for the designation, be a member in good standing with NAIFA in the year you apply for a designation, and meet specific ethical standards. Upon earning the designation, you will be eligible to participate in the annual commencement exercises of The American College. To retain the FSS designation, you must maintain ongoing continuing education and ethics code requirements.

*The American College has partnered with the National Association of Insurance and Financial Advisors (NAIFA) to market and deliver sales training and education. An advisory board, the Financial Services Training Council (FSTC), consisting of leading industry representatives, provides advice and counsel to ensure that the LUTCF and FSS designation programs meet the needs of the financial community The College's standards of academic excellence.*