Put Yourself on the Path to Success with the new

NAIFA LUTCF®


**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
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