

Insurance Continuing Education



2007–2008
November–March

Wisconsin

KAPLAN FINANCIAL

Wisconsin Fee and Continuing Education (CE) Update

As part of the National Uniformity Standards adopted by the NAIC:

- Wisconsin has moved all expiration dates to the end of the licensee's birth month, in the odd or even original licensed year;
- **both** renewal fees and continuing education proof of completion will be due at the same time.

Licensed agents who are required to meet CE requirements must earn 24 hours every two years. Individuals with a license expiration date of 2008 or after must complete three hours of insurance ethics during their compliance period. Refer to your license copy or online transcript for your specific requirements; agents who had a converted compliance date of 2008 must complete 36 credits by that date. To check your renewal year, visit the Wisconsin Commissioner's Website at <https://ociaccess.oci.wi.gov/producerinfo/prdinfo.oci>.

Example: An agent whose birth date is June 17 and who was first licensed in 1993 (odd year):

This agent must complete **24 credits**, due by June 30, 2007.

Example: An agent whose birth date is June 17 and who was first licensed in 1994 (even year):

This agent must complete **36 credits**, of which three must be ethics, due by June 30, 2008.

Renewal fees and CE credits are both due on the same date.

Your satisfaction is guaranteed!

Product Exchange and Return Policy

If for any reason you need to return materials, you can do so within 30 days of purchase. Returned materials must be in a usable, unmarked condition. Software is not returnable after it has been opened.

Tuition Reimbursement Policy

Tuition will be refunded for up to 30 days from the date of enrollment upon return of the materials, or you may apply the cost of tuition to another Kaplan Financial class for up to one year.

What's New for 2007?

Virtual and Online Licensing Exam Prep

We are enhancing our robust line of licensing exam prep courses to include state-of-the-art virtual and online courses for securities and insurance licensing exam prep to give our customers even more choice and flexibility!

- Virtual classes are now available for Series 6, 7, 26, 63, 65, 66, and our new Series 6 Bilingual Spanish virtual class.
- Virtual classes are now available for Life and Health candidates in Georgia, Ohio, and Texas.
- Online self-directed prelicense training is available for Life and Health candidates in California, Georgia and Arizona, with more states coming soon!

Qualified Financial Advisor (QFA)[™]

Build a strong customer-facing staff well versed in financial planning with our new QFA program. This exciting new course teaches the fundamentals of providing financial planning advice to families and individuals and is a perfect complement to our CFP Board-registered programs. Completing Kaplan Financial's QFA program enables learners to become well versed in the most critical components of financial planning: saving for retirement, investment and tax strategies, insurance coverage, education funding, and estate planning.

Upgraded Wauwatosa Facility is now Open!

Our Wauwatosa facility has received a spectacular make-over with new classrooms and digital projectors. Check your email or phone messages with our new complimentary internet kiosks and phones. Enjoy restaurant quality coffee and espresso, ice and filtered water, or use our new convenient vending machines for a quick soda or snack. See page 3 for our Wauwatosa facility address and map.

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Wisconsin Insurance Continuing Education

Preparing for Success

Kaplan Financial is pleased to announce new insurance CE classes for Life and Health and Property and Casualty. Spend some time with us in the classroom and see just how effective and fun a CE course can be. Can't make it to class? Choose from our wide selection of self-study courses in online and textbook formats.

We have adopted the administrative rules relating to the NAIC National Uniformity Standards for agent licensing and CE. These rules will become effective November 1. Highlights of the rule changes include the following:

- New license expiration dates for all agents. The new licenses mailed to everyone in June contain the correct expiration dates. The fee dates and CE compliance dates have been combined and now fall at the end of each individual's birth month. New compliance periods will begin in January 2007.
- Individuals who are required to complete CE must have their compliance met and courses posted before they can pay these fees.
- Twenty four credits in any insurance line with three-hour CE ethics requirement will be imposed beginning in January 2008.
- Correspondence, self-study, and online courses may be approved for CE credit as long as they include successful completion of a certified proctored examination.

Class Times

AM = 8:15 am–12:00 pm

PM = 1:00 pm–4:45 pm

EVE = 5:30 pm–9:15 pm

Course Fees

1 credit = \$19 12 credits = \$129

2 credits = \$29 16 credits = \$169

4 credits = \$49 20 credits = \$199

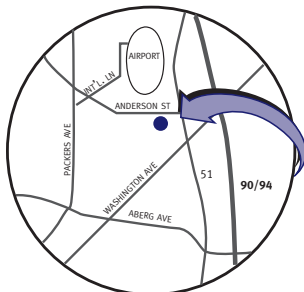
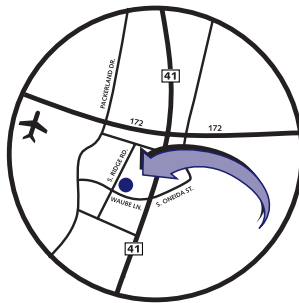
8 credits = \$89 24 credits = \$229

Note: All classes are 4 credit hours unless otherwise noted

Campus Locations

Green Bay

**Kaplan Financial Class Location
Lakeland College**
2985 S. Ridge Rd.
Green Bay, WI 54304



Madison

**Kaplan Financial Class Location
Lakeland College**
3591 Anderson St.
Suite 101
Madison, WI 53704

Wauwatosa

**Kaplan Financial Branch
Office and Class Location**
2300 N. Mayfair Rd.
Suite 205
Wauwatosa, WI 53226



"I enjoyed my experience with Kaplan Professional Schools. The courses are well structured and the instructors are top of the line. I will be coming back for more educational courses.... Thanks to Kaplan Professional Schools my potential earnings are unlimited and my future is secure."

—Kimberly Rodriquez

Wisconsin Insurance Continuing Education

Class Descriptions

ABC's of Life Insurance Planning

Every life insurance agent, whether new or established, who sells and services personal life insurance, should constantly review the needs of the client. "Basic Needs" are what we really are there for. This seminar will address the varied need for family insurance.

Agents and Ethics

This course presents the concept of ethics and how it relates to the sales and service of life insurance, thus creating the foundation for personal as well as professional success.

New! Annuities in the Financial Planning Process

This course explores annuities—their design, use and application; fixed, variable and indexed. The course emphasizes the use of these unique products for asset accumulation as well as income distribution, and discusses how to match a client's needs to an appropriate annuity design. The course looks at how insurers credit interest to their fixed annuities and how separate accounts are used to fund variable annuities.

Asset Allocation

This course provides a better understanding of the strategies and interrelationships involved in asset allocation. You will discuss hedging techniques, timing indicators, yield curves, and risk return analysis, all of which will help you serve your clients' diversification needs.

Disability Income: Play the Odds

Recognize the need for disability income insurance, and learn the benefits and possible risks to your client. Traditionally this has been the most overlooked insurance need.

New! Ethics for Insurance and Financial Advisors

Staying within the rules and regulations is no longer enough—successful advisors adhere to the highest ethical standards. This course will examine ethics in everyday life as well as in our business practices, the principles behind ethics, guidelines for ethical behavior and case studies on business ethics.

Ethics: When No One is Looking

Explore ethics and discover when they are usually (1) in alignment with the majority of society's definitions of correct and positive behavior, (2) within legal parameters, and (3) a balance of good for the individual with good for the whole.

Financial Planning in Retirement

Explore the key challenges to financial security in retirement and identify specific tools and strategies to address them.

Financial Strategies to Achieve

The objective of the course is to increase knowledge and understanding among financial services professionals of issues and tools involved in helping people accumulate and preserve financial assets.



"My overall experience with Kaplan Professional Schools was excellent. The facilities are very nice and comfortable. I enjoyed learning there and will come back for any future education needed."

—Ginger R Hollis

Wisconsin Insurance Continuing Education

Class Descriptions (cont.)

Insurance Beneficiary Designations

Discuss a variety of issues that can be triggered by a poorly drafted beneficiary designation.

Insurance for the 21st Century

This course explores the changing face of the insurance industry, insurance on the Internet, and new insurance products that are being introduced into the marketplace.

Insurance Planning for Seniors

Gain the knowledge necessary to help clients manage their post-retirement financial plans, including understanding the financial concerns facing retirees.

Introduction to Financial Products

This seminar introduces many of the financial products used in the marketplace currently and was designed to be a general overview of those products.

IRAs Today: Products and Distribution

This course is designed to provide a better understanding about who can establish an IRA, the amount that can be contributed, whether contributions can be deductible, and how they can accumulate in their tax-preferred status.

Long-Term Care:

Serving the Health Care Needs of Seniors

What is long-term care? Who pays for it? What kind of policies can you buy? What is covered? What is the NAIC model? This course will address these questions and the various aspects of long-term care.

Making Sense of Tax Reform

Financial insurance professionals are made aware of common mistakes made by clients while dealing with tax-related information for their financial products.

Medicare Supplements (Updated)

Comprehensive and current, this course describes Medicare coverage, the standardized Medigap plans, and the new Medicare Part D section.

Mutual Funds—A Step Beyond the Basics

After a brief review of mutual fund basics, this course investigates additional areas, including measures of volatility, risk, and risk-based performances, to ensure that a fund will meet the goals and objectives of the individual investor.

Personal Financial Planning I and II

The first part of this course covers the many types of insurance and other financial resources available, ranging from simple savings accounts to highly sophisticated investments. The second part of this course is a discussion of risk, investments, insurance, tax planning, retirement planning, and estate planning.

Realistic Retirement Planning

Focus on the many aspects of retirement planning in which today's planners must be familiar: typical client needs and expectations, income needs analysis, product uses and applications (insurance and investment products), retirement funding vehicles (including qualified plans), Social Security, health care, health insurance, and wealth distribution.

“I loved the course because the instructor made it fun and interesting...I would recommend it to anyone.”

—Celia Villegas Uribe

Wisconsin Insurance Continuing Education

Class Descriptions (cont.)

Senior Needs Planning

Identify the financial challenges faced by typical retirees and learn about solutions to meet them. Subjects covered include how to set up a budget and income stream to last a lifetime and wealth accumulation in retirement.

Small Businessowners Insurance

Review the changes in ISO's newest Businessowners Policy developed to keep up with risk exposures of both traditional and e-business insureds. Learners will see the results of recent court decisions on continuous injury triggers in the new liability insuring agreement.

Social Security 2000 and Beyond

Are you covered under the system? What are some of the pressing issues concerning the future of the Social Security system? What is FICA? What is your PIA and AIME? This information is important for professionals in the insurance business to stay current and speak knowledgeably with their clients.

Suitability: Matching the Product to the Need

This course provides suitability guidelines for the recommendation and sale of life insurance and annuity products. Identifying the right plan of protection and/or income accumulation and ensuring its suitability are crucial to client satisfaction and personal success.

Tearing Apart the Homeowners Policy

This course is designed to give the agent an in-depth review of the homeowners policy and frequently used endorsements.

Tearing Apart the Automobile Policy

This course will help you brush up on this important topic. Coverage will be reviewed along with commonly used endorsements.



Planning Calendar

Use this handy calendar when registering for courses and scheduling your exam. If you have questions or comments, call our experienced customer service professionals at 1-800-521-3395.

November 2007

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

December 2007

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23 /30	24 /31	25	26	27	28	29

January 2008

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

February 2008

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	

March 2008

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23 /30	24 /31	25	26	27	28	29

Wisconsin Insurance Continuing Education Class Schedule

Many Courses
Also Qualify for
CFP® Continuing
Education Credits!

November

Date	Day	Start Time	City	Class Name	Credits
2	Fri	8:15 am	Wauwatosa	Long-Term Care: Serving the Health Care Needs of Seniors	4
2	Fri	1:00 pm	Wauwatosa	New! Ethics for Insurance and Financial Advisors**	4
8	Thu	8:15 am	Green Bay	Agents and Ethics**	4
8	Thu	1:00 pm	Green Bay	Insurance Planning for Seniors	4
9	Fri	8:15 am	Green Bay	Today's Estate Planning Strategies	4
9	Fri	1:00 pm	Green Bay	Annuities in the Financial Planning Process	4
19	Mon	8:15 am	Wauwatosa	Mutual Funds—A Step Beyond the Basics	4
19	Mon	1:00 pm	Wauwatosa	Introduction to Financial Products	4
20	Tue	8:15 am	Wauwatosa	Personal Financial Planning I	4
20	Tue	1:00 pm	Wauwatosa	Personal Financial Planning II	4

** Ethics Approved

December

Date	Day	Start Time	City	Class Name	Credits
7	Fri	8:15 am	Wauwatosa	Long-Term Care: Serving the Health Care Needs of Seniors	4
7	Fri	1:00 pm	Wauwatosa	New! Ethics for Insurance and Financial Advisors**	4
10	Mon	8:15 am	Madison	Personal Financial Planning I	4
10	Mon	1:00 pm	Madison	Personal Financial Planning II	4
11	Tue	8:15 am	Madison	Mutual Funds—A Step Beyond the Basics	4
11	Tue	1:00 pm	Madison	Agents and Ethics**	4
27	Thu	8:15 am	Wauwatosa	Today's Estate Planning Strategies	4
27	Thu	1:00 pm	Wauwatosa	Introduction to Financial Products	4
28	Fri	8:15 am	Wauwatosa	Suitability: Matching the Product to the Need	4
28	Fri	1:00 pm	Wauwatosa	Making Sense of Tax Reform *	2
28	Fri	3:00pm	Wauwatosa	Basics of Asset Allocation*	2

** Ethics Approved

January

Date	Day	Start Time	City	Class Name	Credits
2	Wed	8:15 am	Wauwatosa	Senior Needs Planning	4
2	Wed	1:00 pm	Wauwatosa	Insurance for the 21st Century	4
3	Thu	8:15 am	Wauwatosa	Ethics for Insurance and Financial Advisors	4
3	Thu	1:00 pm	Wauwatosa	IRAs Today: Products and Distribution	4
4	Fri	8:15 am	Wauwatosa	Financial Strategies to Achieve	4
4	Fri	1:00 pm	Wauwatosa	Social Security 2000 and Beyond	4
9	Wed	8:15 am	Green Bay	Long-Term Care: Serving the Health Care Needs of Seniors	4
9	Wed	1:00 pm	Green Bay	Medicare Supplements	4
10	Thu	8:15 am	Green Bay	Personal Financial Planning I	4
10	Thu	1:00 pm	Green Bay	Personal Financial Planning II	4
11	Fri	8:15 am	Green Bay	Ethics for Insurance and Financial Advisors	4
11	Fri	1:00 pm	Green Bay	Suitability: Matching the Product to the Need	4
17	Thu	8:15 am	Wauwatosa	Agents and Ethics**	4
17	Thu	1:00 pm	Wauwatosa	Medicare Supplements	4
18	Fri	8:15 am	Wauwatosa	Personal Financial Planning I	4
18	Fri	1:00 pm	Wauwatosa	Personal Financial Planning II	4

** Ethics Approved

Pricing, class dates, and locations are subject to change without notice.

Schedule continues on the next page.

Wisconsin Insurance Continuing Education Class Schedule

Many Courses
Also Qualify for
CFP® Continuing
Education Credits!

February

Date	Day	Start Time	City	Class Name	Credits
6	Wed	8:15 am	Madison	Agents and Ethics**	4
6	Wed	1:00 pm	Madison	Financial Planning in Retirement	4
7	Thu	8:15 am	Madison	Financial Strategies to Achieve	4
7	Thu	1:00 pm	Madison	Senior Needs Planning	4
8	Fri	8:15 am	Madison	IRAs Today: Products and Distribution	4
8	Fri	1:00 pm	Madison	Medicare Supplements	4
21	Thu	8:15 am	Wauwatosa	Suitability: Matching the Product to the Need	4
21	Thu	1:00 pm	Wauwatosa	Making Sense of Tax Reform	4
21	Thu	3:00pm	Wauwatosa	Insurance Beneficiary Designations	4
22	Fri	8:15 am	Wauwatosa	Mutual Funds—A Step Beyond the Basics	4
22	Fri	1:00 pm	Wauwatosa	Social Security 2000 and Beyond	4

March

Date	Day	Start Time	City	Class Name	Credits
12	Wed	8:15 am	Green Bay	Realistic Retirement Planning	4
12	Wed	1:00 pm	Green Bay	Disability Income: Play the Odds	4
13	Thu	8:15 am	Green Bay	IRAs Today: Products and Distribution	4
13	Thu	1:00 pm	Green Bay	Financial Strategies to Achieve	4
14	Fri	8:15 am	Green Bay	Tearing Apart the Automobile Policy	4
14	Fri	1:00 pm	Green Bay	Tearing Apart the Homeowners Policy	4
27	Thu	8:15 am	Wauwatosa	Small Business Owners Insurance	4
27	Thu	1:00 pm	Wauwatosa	Ethics When No One is Looking	4
28	Fri	8:15 am	Wauwatosa	Insurance Planning for Seniors	4
28	Fri	1:00 pm	Wauwatosa	ABC's of Life Insurance Planning	4

** Ethics Approved

Pricing, class dates, and locations are subject to change without notice.

**For the most up-to-date course information and a complete list of approved courses,
visit us at www.kaplanfinancial.com.**



2007 Pocket Tables \$47.50

Be the first to inform your clients of new tax rate and benefit schedules in 2007 by providing them with Kaplan Financial's 2007 Pocket Tables. It is a quick tax reference tool they will value and keep throughout the year. It covers major changes in the tax landscape that become effective for the first time in 2007. Pocket Tables content is prepared by an experienced editorial staff of highly qualified legal and tax professionals. Attach your business card or imprint your company name and use as a promotional mailer to your clients and centers of influence. The retail price reflects one packet of 50 Pocket Table brochures.

Prepare for Insurance and Financial Services Designation Exams with Insurance Achievement!

In July 2004, Kaplan Professional acquired Insurance Achievement®, a nationally recognized provider of self-study professional designation materials for the financial services industry. Insurance Achievement was founded in 1969 and provides learning programs to individuals working toward professional designations—specifically: ChFC®, CLU®, CASL™, CPCU®, ARM®, and AIC®. The acquisition enables Kaplan Financial to augment its professional designation offering portfolio and target customers looking for these designation programs. All study materials are designed with the goal of mastering the required subject matter so that candidates pass their exams on the first attempt.

- Personalized strategies are available to every candidate.
- Courses include a variety of formats to enhance the learning experience.
- Personal counselors are available to assist candidates in earning their designations.
- Exclusive warranty allows unsuccessful candidates to receive updated materials at no cost.

CPCU®, ARM® and AIC® are marks owned by the American Institute for CPCU® and the Insurance Institute of America.

CLU® and ChFC® are registered marks and Chartered Life Underwriter™, Chartered Financial Consultant™, Chartered Advisor for Senior Living™ and CASL™ are marks owned by The American College.

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Now Available! Qualified Financial Advisor (QFA)™ Online Course

Catapult your career into one of the hottest markets—financial planning.

Whether you're new to the field or just want to expand your knowledge base, this outstanding program is your choice. The components of Kaplan Financial's QFA program ensure a solid foundation in the wealth management process, and will help you provide superior service to your clients.

QFA curriculum focuses on:

- the fundamentals of personal investment management and integrated financial planning
- the broad range of financial issues confronting those seeking to increase their wealth and the planning intricacies of high net worth individuals
- the foundation for those interested in the CFP® certification. Those who earn their QFA designation will receive credit toward their mandatory education for the CFP® Certification Exam.

The QFA program is self-directed, so you can learn at your own pace. No textbooks or offline study materials are required.

To begin the QFA course or for more information, call 1-888-694-3568 or visit us online at www.kaplanfinancial.com/QFA.



Sit for the November 2008 CFP® Certification Examination

Classes begin as early as January 2008 for the November 2008 exam cycle. Kaplan Financial offers three high-quality, CFP Board-registered programs to help your associates obtain the required education to sit for the CFP® Certification Examination. Choose from one of the following programs:

- Accelerated Certificate in Financial Planning
- Executive Certificate in Financial Planning
- Online Certificate in Financial Planning

Why Pursue CFP® Certification?

- Establish your credibility and grow your book of business with CFP® Certification.
- The first year of CFP® Certification delivers an average jump of 40% in earnings to advisors.*
- CFP Board research shows that consumers increasingly rely on credentials when selecting a financial adviser.

Accelerated Certificate in Financial Planning

This CFP Board-Registered Program blends a highly effective methodology of self-study and classroom instruction for an excellent learning experience. Choose from virtual or traditional classroom programs. Associates can select from classes offered in six major cities across the United States or participate in our innovative Web-based virtual classes.

- **Traditional classroom** combines live instruction with self-study. This accelerated program consists of six courses and can be completed in just nine months—less than half the time required for typical programs.
- **Virtual classroom** is an instructor-led, Web-based program that provides all the benefits of a traditional classroom from the convenience of the learner's home or office or on the road. The playback feature offers a convenient method for making up missed classes or reviewing key lectures. This program, which comprises six courses, can be completed in just nine months.

Executive Certificate in Financial Planning

University Programs are offered through leading institutions across the country like Fordham and Georgetown Universities. The Executive Certificate in Financial Planning Program (University Programs) is designed to meet the schedule demands of working professionals. The program benefits both experienced professionals seeking to advance their careers and those entering the field for the first time. Programs are available in 9-month and 12-month curriculums.

Online Certificate in Financial Planning

This fully self-paced program designed by Kaplan University is our self-study option. Study anytime, anywhere. Instructors are available via class message boards and through email. The program can be completed in 12 months or less and includes six courses, each consisting of 10 units. There is one online quiz per lesson and an online final exam at the end of each course.

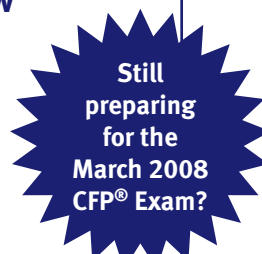
Review Course Options

Ready to sit for the exam but need an intensive review? Review courses are available in traditional, virtual, and online formats. We offer more than 30 classes in 18 states across the country. If you prefer self-study with textbooks, ask about our newly updated materials in our money-saving Platinum package.

Attend This Virtual Class Review

Review Dates: Feb 4, 6, 7 Mar 3, 5, 6
 Feb 11, 13, 14 Mar 3, 4, 5, 6
 Feb 18, 20, 21 Mar 10, 12
 Feb 25, 27, 28 Mar 10, 11, 12
 Feb 26, 27, 28

Review Times: Mon, Wed, and Thu:
 4:00 pm–7:00 pm ET
 or 7:30 pm–10:30 pm ET
 Mon–Thu: 5:30 pm–10:30 pm ET



Accelerated Financial Planner courses are approved for Insurance CE credit in NC, ND, NY, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VA, VT, WA, WV, WI, and WY.

Ensure pass rate success by enrolling in one of our leading programs today!

Class Information		FP101	FP102	FP103	FP104	FP105	FP106
Traditional Live Class November 2008 Certification Exam	Chicago	Jan 17–20	Feb 14–17	Mar 27–30	May 7–10	Jun 19–22	Jul 31–Aug 3
	Houston	Jan 10–13	Feb 14–17	Mar 27–30	May 7–10	Jun 19–22	Jul 31–Aug 3
	Los Angeles	Jan 31–Feb 3	Mar 13–16	Apr 17–20	May 29–Jun 1	Jul 10–13	Aug 21–24
	New York	Jan 24–27	Feb 21–24	Apr 3–6	May 15–18	Jun 26–29	Aug 7–10
	San Francisco	Jan 17–20	Feb 21–24	Apr 3–6	May 15–18	Jun 26–29	Aug 7–10
Virtual Class November 2008 Certification Exam	Class 1	Jan 28	Mar 10	Apr 16	May 28	Jul 2	Aug 11
	Class 2	Jan 30	Mar 12	Apr 17	May 29	Jul 3	Aug 13
	Class 3	Jan 31	Mar 13	Apr 21	Jun 2	Jul 7	Aug 14
	Class 4	Feb 4	Mar 17	Apr 23	Jun 4	Jul 9	Aug 18
	Class 5	Feb 6	Mar 19	Apr 24	Jun 5	Jul 10	Aug 20
	Class 6	Feb 7	Mar 20	Apr 28	Jun 9	Jul 14	Aug 21
	Class 7	Feb 11	Mar 24	Apr 30	Jun 11	Jul 16	Aug 25
	Class 8	-----	-----	May 1	Jan 12	Mar 17	Aug 27

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP® in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements. Kaplan University does not certify individuals to use the CFP®, CERTIFIED FINANCIAL PLANNER™ and CFP®, certification marks. CFP® certification is granted only by Certified Financial Planner Board of Standards Inc. to those persons who, in addition to completing an educational requirement such as this CFP Board-Registered Program, have met its ethics, experience and examination requirements. Kaplan Financial and Kaplan University are review course providers for the CFP® Certification Examination administered by Certified Financial Planner Board of Standards Inc. CFP Board does not endorse any review course or receive financial remuneration from review course providers.

*Source: Average as surveyed in College for Financial Planning 2006, 2007 Survey of Trends in the Financial Planning Industry. Past results do not guarantee future earnings.

Enroll today by calling Kaplan Financial Customer Service at 1-888-694-3568.

To view class schedules and download enrollment forms, please visit www.kaplanfinancial.com.

Enrollment Application

Student Name _____

Social Security # _____

Insurance License # _____

Home Address _____

City _____ State _____ ZIP _____

Company Name _____

Company Address _____

City _____ State _____ ZIP _____

Business Phone _____ Home Phone _____

Fax _____ Email _____

Manager's Name _____

Four Easy Ways to Enroll

1 Online
www.kaplanfinancial.com

2 Fax
414-456-9553

3 Mail
Kaplan Financial
2300 N. Mayfair Rd., Ste. 205
Wauwatosa, WI 53226

4 Phone
1-800-521-3395

Class	For Classroom Courses			Total Due
	Location	Dates	Tuition	

PAYMENT INFORMATION

Ship to: Home Business Pick Up

All enrollments must be prepaid. Prices are subject to change without notice.

Check # _____

Visa MasterCard American Express Discover

Card # _____

Exp. Date _____

Signature _____

Total Purchase	
Sales Tax*	
Shipping & Handling \$9 <small>Add \$3 for each additional course</small>	
TOTAL	

*Tax applies to product sales only, not to classes.
Express shipping \$11.
UPS will not ship to PO boxes.

To ensure timely grading and reporting, we suggest exams be sent to Kaplan Financial (location noted on exam) a minimum of 30 days before the date the license expires.



Wisconsin
Insurance Continuing Education
November 2007–March 2008

About Kaplan Financial
Kaplan Financial is comprised of Schweser, a Kaplan Professional company, and these former companies: Dearborn Financial Services, BISYS Education Services, eMind, and Insurance Achievement.



Seeking Experienced Professionals

- Do you have a passion to stand up and speak?
- Are your presentations engaging and dynamic?
- Do others seek out your expertise and industry insights?

If so, we have a great opportunity for you!

We are currently seeking qualified securities and insurance instructors to join our team.

To learn about opportunities in your area, please send your resume along with a letter outlining your qualifications to kaplaninc@trm.brassring.com.