

# Insurance and Securities Licensing



2007–2008  
November–March

Wisconsin

**KAPLAN** FINANCIAL

# Kaplan Financial Equips You To Be a Financial Services Professional

## Insurance

The Wisconsin Department of Insurance regulates the sale of insurance in Wisconsin, and requires sales representatives to be licensed. The Life/Accident/Health license authorizes you to sell life, health, disability and long term care insurance, annuities, and related coverage. The Property/Casualty license allows you to sell auto and homeowners insurance, as well as commercial property and liability coverage.

Kaplan Financial offers insurance licensing courses that will allow you to quickly and successfully complete your education and pass your state licensing exam. Our customers tell us that convenience is crucial so we have developed a variety of class formats to fit every schedule—from classroom to online.

Classroom education has many benefits. Experienced instructors expose you to a broad array of insurance concepts. The curriculum will explain exactly how insurance works in Wisconsin and provide insight into various types of policies. Our classes prepare you to pass the state test on your first attempt with the utmost confidence. Students leave our classes with a solid foundation upon which to build a career in the insurance business.

## 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.

|   |      |
|---|------|
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## Securities

In order to sell stocks, bonds, mutual funds, and variable annuity products, a person must be registered with the Financial Industry Regulatory Authority (FINRA®). While there is no mandatory education, many candidates lack the necessary experience in the securities industry to pass the required series examinations without prior preparation.

Kaplan Financial delivers exam prep courseware to match adult learning styles and to help busy professionals prepare to pass the securities exams—the first time. We recommend a classroom learning environment with teacher and peer interaction and we offer the largest national classroom network, with classes held in most major U.S. metro centers.

For candidates without access to a traditional class, Kaplan offers virtual classes, which are live classes delivered via the internet. Our virtual and traditional classroom offerings feature Kaplan's signature, experienced instructors who deliver engaging, exam-focused training. Current, user-friendly, course materials feature numerous examples and exercises to help maximize retention and a variety of study tips to help candidates prepare to pass the exams the first time. Kaplan also offers practice test banks and correlate exams that simulate the actual exam experience in degree of difficulty and topic coverage.

## Kaplan for Life

Once you have earned your insurance license or securities registration, Kaplan Financial will be your education partner for life. You can select from a robust library of continuing education on every subject. And, we partner with most of the largest financial services companies in the country to provide their employees with training and to maintain compliance within their field.

So whether you are looking to add another license, renew an existing one, or obtain an advanced designation in your field, look to Kaplan Financial for your professional training needs. CERTIFIED FINANCIAL PLANNER™ programs are just one of the ways professionals are making themselves more valuable to their clients, and Kaplan Financial has a robust program to assist you in earning your CFP® certification.



## What's New for 2007?

# 07

### 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.
- Several states will allow online life and health prelicensing training for the first time in 2007. Watch for Kaplan Financial's online licensing programs for California, Georgia, Oregon, Ohio, and Florida—with more states coming throughout the year.

### Adjuster Licensing

Adjuster recruits can now obtain the excellent, results-driven license training they need from Kaplan Financial. Candidates will benefit from our successful adjuster licensing program, previously available only in Texas. In 2007, the offering will be expanded to include all 29 states that require adjuster licenses.

### Qualified Financial Advisor (QFA)<sup>TM</sup>

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.



**NEW! Property and Casualty now offered in Madison. See page 5 for the schedule.**

### Campus Locations

Courses are offered at Kaplan Professional Schools locations. Kaplan also offers courses in real estate, appraisal, and home inspection. Call or visit [www.kaplanprofessionalschools.com](http://www.kaplanprofessionalschools.com) for more information.

**Appleton**  
Kaplan Financial  
Class Location  
**La Quinta Inn & Suites**  
3730 W. College Ave.  
Appleton, WI 54914

**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



# Insurance Licensing Classes (cont.)

| Class and Information   | Location  | Nov   | Dec                | Jan           | Feb                 | Mar   |
|---|-----------|-------|--------------------|---------------|---------------------|-------|
| <b>Property and Casualty</b><br>Class with materials: \$159      Credit hours: 24<br>Class length: 3 days              8:15 am–5:00 pm<br><i>*Class meets Sun and following Sat and Sun</i> | Madison   |       |                    | 29–31         |                     | 25–27 |
|   | Wauwatosa | 27–29 | 9&15–16W*<br>18–20 | 8–10<br>29–31 | 17&23–24W*<br>19–21 | 11–13 |
|   |           |       |                    |               |                     |       |
| <b>Casualty Only</b><br>Class with materials: \$109      Credit hours: 12<br>Class length: 1½ days            Day 1: 8:15 am–5:00 pm<br>Day 2: 8:15 am–12:00 pm                             | Madison   |       |                    | 29–30         |                     | 25–26 |
|   | Wauwatosa | 27–28 | 9&15–16W*<br>18–19 | 8–9<br>29–30  | 17–18W<br>19–20     | 11–12 |
|   |           |       |                    |               |                     |       |
| <b>Property Only</b><br>Class with materials: \$109      Credit hours: 12<br>Class length: 1½ days            Day 1: 1:00 pm–5:00 pm<br>Day 2: 8:15 am–5:00 pm                              | Madison   |       |                    | 30–31         |                     | 26–27 |
|   | Wauwatosa | 28–29 | 15–16W<br>19–20    | 9–10<br>30–31 | 21–22<br>23–24W     | 12–13 |
|   |           |       |                    |               |                     |       |

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

W = Weekend Class

## Planning Calendar

### 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  | 24  | 25  | 26  | 27  | 28  | 29  |
| 30  | 31  |     |     |     |     |     |

### 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  | 24  | 25  | 26  | 27  | 28  | 29  |
| 30  | 31  |     |     |     |     |     |

## Insurance Licensing Study Aids



### State License Exam Manual \$49

Our redesigned, state-specific License Exam Manual combines general insurance concepts and state-specific insurance laws/regulations in one

convenient text. Helpful study tips are featured through Take Note icons, Test Topic Alerts, and unit tests.

### Audio Review \$29

Professional voices relay the most testable information in a Q&A



format on these convenient CDs. The audio experience provides excellent reinforcement and fully integrates with the companion Kaplan Financial study materials.

### Drill & Practice Test Bank \$49

(Online or CD-ROM)

Learners will benefit from this database of exam-focused questions from which they can customize a nearly unlimited number of practice exams. Drill & Practice products are customized by



state. Our proprietary exam simulator is able to precisely simulate the weighting of each state exam, according to the state outline. The Drill & Practice Test Bank produces an exam to challenge the learner much like the actual exam. Both general insurance questions and state-specific material are included in this powerful study tool. Choose online or CD-ROM.



### Correspondence Exam \$29

# Study Anywhere, Anytime with Kaplan's Virtual Classes for Securities Licensing Exam Prep

## Kaplan Financial Has a Solution for You!

Kaplan's virtual class experience is an Internet-delivered alternative for a traditional class, ideal for exam candidates in remote areas who do not have access to a live class. Available for Series 6, 7, 26, 63, 65, 66, and Series 6 Bilingual Spanish, these interactive virtual classes feature the same engaging Kaplan Financial instructors that our traditional classes do.

### Why partner with Kaplan Financial?

Candidates prepare to pass the exams the first time with all the benefits of our signature live classes. Corporate managers are empowered to deliver high-quality, consistent programs that help candidates get to market and produce revenue more quickly, while saving time and boosting productivity.

## Solution Overview

Our new, innovative virtual class experience engages learners from the moment the class begins. Expert instructors present the material live while learners follow along with a PowerPoint® presentation and Student Notebook. Frequent interactive opportunities throughout each presentation engage learners and help to maximize retention of critical concepts. Students can ask questions by raising their hand and speaking through their headset microphone or by sending a question through private text chat to the instructor or to the entire class.

### Key Features

**Outstanding instructors** deliver an engaging and interactive learning experience.

**Frequent comprehension checks**, test prep questions, test tips, and assessments give learners the edge in testing skill.

**Continual opportunities** for learner feedback and comments encourage participation, including yes/no polls, hand claps, and text chats.

**Sharp graphics** illustrate key concepts for maximum retention.

**Recorded class playbacks** provide an unlimited opportunity to review and reinforce key concepts for 45 days after class.

**Knowledge Center** offers fingertip access to a comprehensive suite of support resources, including the following:

- Daily study calendar
- Assignments
- Class resources
- Links to Audio Reviews and diagnostic exams

## Headset Offer

For complete interactivity with the instructor and others attending the virtual class, we offer a headset with built-in microphone for only \$19. Order when you enroll in class.

## Virtual Class Materials



### License Exam Study Manual

An exam-focused study manual complete with current content, interactive exercises, Quick Quizzes, and Test Topic Alerts.

### Drill & Practice Test Bank (CD)

Learners will sharpen test-taking skills and increase comprehension with this easy-to-use, robust database of test questions that enables learners to customize practice exams. It contains detailed rationales and practice final exams that simulate the actual exam in proportional topic and weighting.



### Student Notebook

A concise, easy-to-use tool that includes important study notes and highlights critical exam-focused content. This resource provides a convenient note-taking opportunity for organized, post-class review.

### Enrichment Exams

This concise collection showcases practice questions built on the most newly tested topics and is frequently updated to address the latest regulations and testable concepts. It is strongly recommended that learners carefully review all Enrichment Exam questions and rationales before testing to ensure the best possible exam performance.

## Optional Study Tools—Call for Pricing

### Mastery Exam

Learners test exam readiness with this predictive exam experience that gives a final reading of areas of strength and weakness. Designed and rigorously field tested to simulate the exam in topic coverage and degree of difficulty, this exam is an outstanding follow-up for self-study, classroom or virtual classroom courses.

### Audio Review—(CD format)

Audio Review is an excellent add-on study tool, reinforcing the most testable points presented in Kaplan Financial's study materials. It provides an overview of the most critical information from each lesson in audio CD format.

## Support Services

**Guided Study Calendar** features recommended daily study activities that follow Kaplan Financial's proven study system.

**Instructor Chat** before each daily class session.

**AnswerPhone<sup>SM</sup>** connects learners to Kaplan Financial's team of subject matter experts for assistance in mastering material.

Call 1-800-570-9235 for more information about our virtual securities classes!



# Securities Exam Prep Classes (cont.)

| Class and Information  | Location  | Nov          | Dec   | Jan   | Feb   | Mar             |
|--|---|--------------|-------|-------|-------|-----------------|
| <b>Series 65</b><br><b>Uniform Investment Advisor Exam:</b> Required of individuals acting as or soliciting for the service of investment advisers. This exam may be required in addition to other exams.<br>Class with materials: \$249      Class only: \$139<br>Class length: 2 days              8:30 am–5:00 pm   | Wauwatosa   | 5–6          |       | 3–4   |       | 5–6             |
|  | Kaplan has added additional Series 65 and 66 Virtual Classes due to the upsurge in licensing activity as a result of the recent court ruling overturning the broker-dealer exemption. |              |       |       |       |                 |
| Class with materials: \$229<br>Class length: 3 days  | VIRTUAL CLASS   | 7–9<br>28–30 | 5–7   | 9–11  | 6–8   | 5–7             |
| <b>Series 66</b><br><b>Series 66 Uniform Combined State Law Exam</b> (equivalent of S-63 plus S-65): Required of individuals acting as or soliciting for the service of investment advisers and soliciting the purchase or sale of securities within a state. Fulfills the requirements of both the Series 63 and Series 65.<br>Class with materials: \$219      Class only: \$129<br>Class length: 1 day              8:30 am–5:00 pm | Wauwatosa   | 5            |       | 3     |       | 5               |
|  | Kaplan has added additional Series 65 and 66 Virtual Classes due to the upsurge in licensing activity as a result of the recent court ruling overturning the broker-dealer exemption. |              |       |       |       |                 |
| Class with materials: \$199<br>Class length: 2 days  | VIRTUAL CLASS   | 5–6<br>26–27 | 3–4   | 7–8   | 4–5   | 3–4<br>31–Apr 1 |
| <b>Series 24</b><br><b>General Securities Principal:</b> Required of individuals responsible for the management or supervision of a member’s investment banking or securities business. The Series 24 qualifies an individual as a General Securities Principal.<br>Class with materials: \$429      Class only: \$319<br>Class length: 2 days              8:30 am–5:00 pm  | Wauwatosa   |              |       | 7–8   |       |                 |
|  |   |              |       |       |       |                 |
| <b>Series 26</b><br><b>Investment Company Products/Variable Contracts Limited Principal:</b> Required of individuals, who will supervise individuals soliciting the purchase or sale of redeemable securities, variable contracts and insurance premium funding programs issued by insurance companies.<br>Class with materials: \$379      Class only: \$269<br>Class length: 2 days              8:30 am–5:00 pm                     | Wauwatosa   |              | 13–14 |       |       |                 |
|  |   |              |       |       |       |                 |
| Class with materials: \$349<br>Class length: 4 days  | VIRTUAL CLASS   | 12–15        | 10–13 | 21–24 | 25–28 | 17–20           |

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

*“If you are serious about passing your insurance exam on the first attempt, attend the Kaplan exam prep. It helped me gain the confidence I needed to pass my insurance test on the first attempt. Now I can focus on my passion, making a difference in the lives of my clients.”*

—Castillo Luis

# Securities Licensing Self-Study Courses and Study Aids

| Series                       | Options  | Price   | Series       | Options   | Price   |   |
|------------------------------|--|---|--------------|---|---|---|
| Series 6                     | <b>Manual with Drill &amp; Practice</b><br>(online or CD) .....                        | \$139   | Series 3     | <b>Manual with Drill &amp; Practice</b><br>(online or CD) ..... | \$199   |   |
|                              | <b>Complete Online Course</b> —includes Online Manual and Online Drill & Practice ...  | \$139   |              | Series 4  | <b>Manual with Drill &amp; Practice</b><br>(online or CD) ..... | \$229   |
|                              | <b>Audio Review CD</b> .....   | \$39  |              |   | Series 9  | <b>Manual with Drill &amp; Practice</b><br>(online or CD) .....           |
| Series 7                     | <b>Manual with Drill &amp; Practice</b><br>(online or CD) .....                        | \$249   | Series 10    |   |   | <b>Manual with Drill &amp; Practice</b><br>(online or CD) .....           |
|                              | <b>Complete Online Course</b> —includes Online Manual and Online Drill & Practice ...  | \$249   |              | Series 24   |   | <b>Manual with Drill &amp; Practice</b><br>(online or CD) .....           |
|                              | <b>Audio Review CD</b> .....   | \$39  |              |   | Series 26   | <b>Manual with Drill &amp; Practice Test Bank</b><br>(online or CD) ..... |
| Series 63                    | <b>Manual with Drill &amp; Practice</b><br>(online or CD) .....                        | \$49  | Series 27/28 |   |   | <b>Manual with Drill &amp; Practice</b><br>(online or CD) .....           |
|                              | <b>Complete Online Course</b> —includes Online Manual and Online Drill & Practice .... | \$49  |              | Series 31   |   | <b>Manual with Drill &amp; Practice</b><br>(online or CD) .....           |
|                              | <b>Audio Review CD</b> .....   | \$39  |              |   | Series 51   | <b>Manual with Drill &amp; Practice</b><br>(online or CD) .....           |
| Series 65                    | <b>Manual with Drill &amp; Practice</b><br>(online or CD) .....                        | \$149   | Series 53    |   |   | <b>Manual with Drill &amp; Practice</b><br>(online or CD) .....           |
|                              | <b>Audio Review CD</b> .....   | \$39  |              | Series 55   |   | <b>Manual with Drill &amp; Practice</b><br>(online or CD) .....           |
|                              | Series 66  | <b>Manual with Drill &amp; Practice</b><br>(online or CD) ..... |              |   | \$139   |   |
| <b>Audio Review CD</b> ..... |  | \$39  |              |   |   |   |



## Kaplan Financial Self-Study Exam Prep

Includes the interactive Study Manual and Drill & Practice CD. The Drill & Practice CD contains a database of exam-focused questions from which students can create an unlimited number of practice exams.

Exams are proportional in topic and

weight to the actual exam. Most sets include print exams.

## Online Courses for Series 7, 6, and 63

Our courses for Series 7, 6, and 63 offers students a fully interactive and engaging study experience in an online environment. Each course features an online study manual with clearly defined learning objectives, alerts for highly testable subjects, audio clips to reinforce learning, bookmarking, Quick Quizzes, an unlimited number of customizable practice exams, and a final exam that simulates the actual testing experience.



## Audio Review—CD

Audio Review is an excellent add-on study tool, reinforcing the most testable points presented in Kaplan Financial's study materials. It provides an overview of the most critical information from each lesson in audio CD format.



## 2007 Pocket Tables .....\$47.50 per packet

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.

# 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 am–10:30 pm ET

Still preparing for the March 2008 CFP® Exam?

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

| Class Information   |               | FP101        | FP102     | FP103     | FP104        | FP105     | FP106        |
|---|---------------|--------------|-----------|-----------|--------------|-----------|--------------|
| <b>Traditional Live Class</b><br>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     |
| <b>Virtual Class</b><br>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       |

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\*Source: CFP 2006, 2007 Survey of Trends in the Financial Planning Industry.

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](http://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**  
1-414-456-9553

**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 |           |
|       |                       |       |         |           |
|       |                       |       |         |           |
|       |                       |       |         |           |
|       |                       |       |         |           |
|       |                       |       |         |           |
|       |                       |       |         |           |
|       |                       |       |         |           |
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