

INSCE028 Life Insurance Continuing Education Course Syllabus

Course Information

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| Course Title: | Life Insurance CE |
| Course Number: | INSCE028 |
| Course Description: | This course is designed to refresh the knowledge of the student regarding life insurance concepts and application. Work at your own pace with your instructor available via e-mail or telephone as needed. Topics covered include: Life Insurance Policies, Life Insurance Policy Provisions and Options/Riders, Life Insurance Beneficiaries, Life Insurance Premiums and Proceeds, Life Insurance Underwriting and Policy Issue, Group Life Insurance, Annuities, Social Security, Retirement Plans, and Uses of Life Insurance. |
| Location: | Completely Online |
| Available: | 24/7, 365 days a year |
| Course Length: | 3 months |

Course Goals

The Goal of this course is to provide an intermediate level experience to the agent about the concepts and application of an array of life insurance policies and their uses in today's marketplace.

Instructor Information

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| Instructor: | Jerry Bateman, CLU, ChFC, LUTCF |
| Email: | bateman@oltraining.com |
| Office: | 2669 Forest Hill Blvd. Ste. 207, West Palm Beach FL 33406 561-283-0333 or toll free 866-357-0841 |
| Biography: | Jerry E. Bateman, CLU, ChFC, LUTCF has been active in the insurance and financial services industry since 1976. During this time, he has attained the Chartered Financial Consultant (ChFC) and the Chartered Life Underwriter (CLU) designations, both conferred by the American College, and the Life Underwriter Training Council Fellow (LUTCF) designation through the Life Underwriter Training Council. Additionally, he attained a Bachelor of Electrical Engineering from Auburn University in 1972. |

Course Outline

| Lesson | Title | Hours |
|---------------|---|--------------|
| 1 | Life Insurance Policies | 2.50 |
| 2 | Life Insurance Policy Provisions and Options/Riders | 2.00 |
| 3 | Life Insurance Beneficiaries | 0.50 |
| 4 | Life Insurance Premiums and Proceeds | 1.00 |
| 5 | Life Insurance Underwriting and Policy Issue | 1.00 |
| 6 | Group Life Insurance | 0.25 |
| 7 | Annuities | 1.00 |
| 8 | Social Security | 0.50 |
| 9 | Retirement Plans | 1.00 |
| 10 | Uses of Life Insurance | 0.50 |
| | Total Hours (Rounded Down) | 10.00 |