

Published Work

Annuities

Advanced Variable Annuities
CA 4-Hour Annuity Course
California Annuities (8 hours)
Equity Indexed Annuities
Equity Indexed Annuities
Fixed Annuities
Fundamentals of Declared-Rate Annuities
Guaranteed Living Benefits for Variable Annuities
Guaranteed Minimum Accumulation Benefits
Guaranteed Minimum Income Benefits
Guaranteed Minimum Withdrawal Benefits
Introduction to Annuities
Modern Variable Annuity Contract Benefits
Senior Protection in Annuity Transactions
Suitability of Annuities
Taxation and Suitability of Annuities
Variable Annuities in Retirement Planning
Variable Annuity Living Benefit Riders

Business Organization

Business Entities: Selecting the Proper Business Structure

Disability Insurance

Disability Insurance Products and Principles

Ethics

Ethical Conduct in the Financial Services Practice
Ethical Considerations in Selling to Seniors
Ethical Investment Practices
Ethical Practice Standards for Today's Producer
Ethics for CFP Certificants and Registrants
Ethics for Financial Services Professionals
Ethics for Insurance Professionals
Investment Advisers: Code of Conduct
Legal & Compliance Issues in the Insurance Business

Tax Return Preparer Ethical Issues

Group Insurance

Group Dental & Vision Insurance

Group Disability Insurance

Group Health Insurance

Group Life Insurance

Healthcare

Healthcare Reform: Pre-Existing Conditions, Benefit Limits, Rescission & Patient Protection Rules

Oklahoma Healthcare Reform

Human Resources Management

Information Security Awareness

Sexual Harassment in the Workplace

Indexed Products

Advanced Indexed Insurance Products

Equity Indexed Products

Ethics, Marketing Practices & Suitability Issues in Indexed Product Sales

Iowa Indexed Products

Overview of Indexed Products

Insurance Licensing

Life & Health Insurance Licensing Preparation

Insurance Sales

Creating a Business Plan

Creating a Marketing Plan

Gaining Client Agreement to Gather Information

Insurance Need Analysis

Selling VUL—Concepts & Techniques

Time Management & Goal Setting

Law

Hawaii Law - Mental Illness, Alcohol & Drug Abuse Treatment

Hawaii Law - Privacy of Consumer Financial Information

HIPAA

Life & Health Insurance Law

Oregon Insurance Law

Pension Protection Act of 2006

Regulation 60: Doing Business in New York

Tax-Free Exchanges

The Essentials of Insurance Law

Unauthorized Entities

Life Insurance

Advanced Applications of Life Insurance

Basic Life Insurance Provisions

Business Insurance

Insurance Risk and Rewards

Life Insurance & the Peace of Mind it Offers

Life Insurance Policies

Overview of Variable Contracts

Survey of Advanced Sales (Revision)

Universal Life Insurance

Variable Universal Life Insurance

Viatical and Life Settlements

Long Term Care

"Long Term Care," Journal of The American Society

Florida Long Term Care Regulations

Hybrid LTC Products

Idaho Long Term Care Regulations

Long Term Care Fundamentals

Meeting Long Term Care Needs through Combination Products

Minnesota Long Term Care Regulations

Virginia Long Term Care Partnership Program

Virginia Long Term Care Regulations

Nonqualified Benefit Plans

Deferred Compensation

Nonqualified Plans

Planning

Business Succession Planning

Customer Data Security & Business Continuity Planning

Employing Trusts in the Estate Planning Process

Estate Planning

Estate Tax Planning

Executive Benefit Planning

Financial Planning

Personal Life Insurance Planning

Principles of Wealth Management

Retirement Options

Retirement Planning

Retirement Planning for Seniors

Retirement Strategies

The Retirement Answer

Property & Casualty Insurance

Basics of Property & Casualty Insurance Coverage

Questionable Property & Casualty Claims

Qualified Retirement Plans

Qualified Plans (9 lessons)

Advanced 403(b) Plans

Individual 401(k) Plan Funding

Individual Retirement Accounts

Keogh Plans

Pensions & Profit Sharing

Qualified Plan Design

Stretch IRA Distributions

Tax Sheltered Annuity 403(b) Plans

Reinsurance

The Principles of Reinsurance

Securities

Advanced Structured Products

Anti-Money Laundering 2006 Update
Anti-Money Laundering Update: 2008
Appropriate Solicitation of Senior Investors
Brokered Certificates of Deposit
Callable CDs
Client Communications
Collateralized Mortgage Obligations
Communications With the Public
Deferred Variable Annuities – Rule 2330
Direct Participation Programs
Fixed Income Securities
Gifts & Gratuities
Insider Trading and Chinese Walls
Institutional Account Documentation
Maintaining Customer Accounts
Managed Futures Funds
Meeting the Needs of all Generations
Mutual Funds
NASD Advertising Regulations
Overview of Insurance Investment Products
Real Estate Investment Trusts (REITs)
Registered Representative Sales Activity Guidance
Securities Sales Supervision 2005 Update
Securities Supervision 2006 Update
Securities Supervision 2007 Update
Short Selling: Rule 10b-21
Structured Products
Suitability and Insurable Needs of the Senior Investor
Suitability Issues of Variable Products
Suitability of Variable Products
Supervision Update: 2008
Supervision Update: 2009
Working with Nonresident Aliens
Wrap Fee Accounts

Social Security

Social Security: Taxation & Benefits

Taxation

Retirement Plans, Pensions and Annuities

Tax Planning From the Heart

Tax Preparer Competency Course

Taxation of Financial Products

Tax Return Preparer Ethical Issues

Tax Treatment of Individual Retirement Arrangements

Tax Treatment of Life Insurance Proceeds

Tax Treatment of Sickness and Injury Plans

What's New for 2011