



SYLLABUS – LIFE & HEALTH INSURANCE – 2-Day Live & OnDemand Class

Total Class Time: 6.5 hours (including lunch and breaks)

Class Hours: 11:00 - 5:30 Eastern Time

Class Materials: Next Generation LEM

DAY #1

11:00 AM *Introductory comments/Review agenda & instructional materials*

11:10 AM *UNIT #1 – General Insurance*

11:50 AM *UNIT #2 – Life/Health Insurance Underwriting*

12:20 PM BREAK

12:30 PM *UNIT #3 – Basics of Life Insurance*

1:00 PM *UNIT #4 – Types of Life Policies*

1:30 PM *UNIT #5 – Life Insurance Riders*

2:00 PM LUNCH

2:30 PM *UNIT #6 – Life Insurance Policy Options*

3:00 PM *UNIT #7 – Life Insurance Policy Provisions*

3:30 PM *UNIT #8 – Group Life Insurance*

3:45 PM BREAK

3:55 PM *UNIT #9 – Annuities*

4:15 PM *Unit #10 – Taxation of Life Insurance and Annuities*

4:50 PM *Unit #11 – Retirement Plans*

5:15 PM *State Laws Test Taking Tips*

5:30 PM *DISMISSAL*

DAY #2

11:00 AM *Introductory comments/Review Agenda & Instructional materials*

11:10 AM *UNIT #12 – Introduction to Health Insurance*

11:35 AM *UNIT #13 – Affordable Care Act*

12:00 PM *Unit #14 – Health Insurance Policy Provisions*

12:30 PM BREAK

12:40 PM *UNIT #15 – Disability Income Insurance*

1:20 PM *UNIT #16 – Medical Expense Plans*

1:40 PM *Unit #17 – Other Health Plans*

2:00 PM **LUNCH**

2:30 PM *UNIT #18 – Group Health Insurance*

2:50 PM *UNIT #19 – Dental Insurance*

3:10 PM *UNIT #20 – Medicare & Medicaid*

4:15 PM **BREAK**

4:25 PM *UNIT #21 – Long-term Care*

4:55 PM *Unit 22 – Taxation of Health Insurance*

5:15 PM *State Laws/test taking tips*

5:30 PM *DISMISSAL*