

Earn More with a CASL® Designation

KAPLAN
FINANCIAL EDUCATION

INSURANCE ACHIEVEMENT

KESD@E

Set Yourself Apart

In the turmoil of today's economy, clients prefer professionals with advanced designations who can provide them with a higher level of expertise to help them protect their assets and rebuild their investments. With an advanced designation, you can:

- Increase your income by 51%*
- Offer a wider range of products
- Possess specialized knowledge
- Boost your credibility



\$ **99**
per course

Walk into Your Exam with Confidence

Each Essential Study Solution provides insight into frequently tested topics and subtle strategies that will prepare you for the toughest questions, allowing you to walk into your exam with confidence.

* By an average of 51%, according to the Bureau of Labor Statistics, U.S. Dept. of Labor.

Why You Should Earn Your CASL®

Representing nearly a third of the population at 76 million strong, the baby boomer generation has moved into the second half of life, making the future of senior advising a very lucrative profession. The Chartered Advisor for Senior Living® (CASL®) designation is the leading credential for professionals interested in helping retirees—and those facing retirement—meet their financial needs in:

- Saving for retirement
- Developing effective estate planning strategies
- Structuring distributions from pensions, 401(k)s, 403(b)s, IRAs, and Social Security
- Planning for health and long-term care needs
- Managing life course transitions

Gain a competitive edge in an increasingly competitive market with the CASL program's insight into a range of topics affecting the middle to senior age bracket.

The CASL designation is awarded by The American College.



The Essential Study Solution

The Essential Study Solution for each course has been designed to help you walk into your exam with confidence. Each Essential Study Solution contains more study tools than any other provider because we understand that everyone's learning style is unique.

eBooks (study guides)

- Page count: 200-350 pages
- Realistic examples, terms and key points
- Search through the page numbers
- Carry many eBooks with you on your mobile devices like tablets and smartphones

Interactive Infographic QuickSheet

- On-the-go review, anytime, anywhere
- Review after an assignment or before a practice exam
- Last-minute review before your exam
- Use as a reference guide in your daily work

Videos

- Total number of videos 74
- Videos of instructor-led presentations
- Each video of 10 to 15 minutes in length.
- There is an average of 7 videos per course.

Diagnostic Exams

- 750 online practice questions in each topic
- Timed tests in exam format
- Allow to test yourself under exam conditions

Support from SME's

- e-mail support by our Subject Matter Experts regarding content queries/clarifications

Assignment Summaries

- Use PDF Assignment Summaries for easy online access to core content
- Increase your comprehension of each course assignment

Save Two Years in Earning Three Designations*

Take advantage of duplicate requirements

Once you have earned one designation, it is easy to achieve a second, or even a third designation, because the programs share many of the same courses.

One of the “fast tracks” to earn all three insurance designations offered by The American College is to start with your ChFC®. You will benefit because you end up taking eight fewer courses over three designations.

1. Once you complete your ChFC by taking the nine courses highlighted, you'll be able to earn your CLU® by taking just three additional courses instead of eight.
2. Once you complete your CLU three, you'll be able to earn your CASL® by taking just two additional courses instead of five.

Note: If you start with your CASL, you can also take eight fewer courses. If you start with your CLU, you can take up to seven fewer courses.

* Saving two years is based on the assumption that a candidate completes one course every three months.



ChFC® Courses:

7 Required Courses (Take all seven)	
300	Financial Planning: Process and Environment
311	Fundamentals of Insurance Planning
321	Income Taxation
326	Planning for Retirement Needs
328	Investments
330	Fundamentals of Estate Planning
332	Financial Planning Applications
Elective Courses (Take the two highlighted)	
322	The Financial System in the Economy
334	Estate Planning Applications
352	Financial Decisions for Retirement

ChFC Earned

CLU® Courses:

5 Required Courses (Take the three highlighted)	
311	Fundamentals of Insurance Planning
323	Individual Life Insurance
324	Life Insurance Law
330	Fundamentals of Estate Planning
331	Planning for Business Owners and Professionals
Elective Courses (You won't need any)	
300	Financial Planning: Process and Environment
321	Income Taxation
326	Planning for Retirement Needs
328	Investments
334	Estate Planning Applications

CLU Earned

CASL® Courses:

5 Required Courses (Take only the two highlighted)	
328	Investments
330	Fundamentals of Estate Planning
350	Understanding the Older Client
351	Health and Long-Term Care Financing for Seniors
352	Financial Decisions for Retirement

CASL Earned