TRINIDAD AND TOBAGO ASSOCIATION OF INSURANCE AND FINANCIAL ADVISORS

FSCP

FINANCIAL SERVICES CERTIFIED PROFESSIONAL

A FOUNDATION FOR SUCCESS

The FSCP program covers all of the essential skills to successfully launch your career as financial services professional or to grow your practice by marketing new products and services. You will learn crucial prospecting and marketing techniques, fundamentals of a wide range of products, how to meet client needs and how to build a successful business. Taught by industry experts, and reflective of current trends and market realities like social media and regulatory constraints, the practical and relevant skills advisors learn can be applied right away.

FSCP program courses are offered live to provide students with a convenient way to improve their skills and product training that will advance their careers.

ADVISORS WITH THE FSCP HAVE

90%

Better four year retention rates

EARNING THE FSCP DESIGNATION

FSCP program courses are offered live to provide students with a convenient way to improve their skills and product training that will advance their careers. To earn the FSCP Designation, you must:

- *Complete the eight courses*
- *Complete the required (self-study) ethics course*
- *Complete the Certification Course and Exam*

Not working toward the FSCP Designation? You can take any course to stay current on important topics affecting advisors today.

FUNCTIONAL, FOUNDATIONAL.

The Financial Services Certified Professional (FSCP) designation offers the most complete product knowledge and marketing and planning skills training available to financial services professionals today. Gain the practical knowledge and skills you need to establish a successful, ethical practice. Learn using the active leaning process of Learn, Discuss, Do, Reflect and transform knowing into doing.

COURSE DETAILS

REQUIRED COURSES

FA 201 Techniques for Exploring Personal Markets: *Provides an in-depth look at penetrating the personal markets using the life-cycle marketing strategy and selling/planning process.*

FA 202 Techniques for Meeting Client Needs: *Offers an introduction to the life insurance sales career and the sales/planning process in the personal market.*

FA 251 Essentials of Business Insurance: *Covers how life and disability income insurance can guarantee the control and value of a business following the owner's or key person's death, disability, or retirement through buy-sell agreements and key person insurance.*

FA 257 Essentials of Life Insurance Products: *Begins with an overview of the two basic types of life insurance policies – term and whole life – and then build on the at knowledge with an overview of the many product variations sold in today's markets.*

FA 261 Foundations of Retirement Planning: *Guides professionals in examining the retirement planning process, fact finding, methods of analyzing facts, retirement planning software, and sales tracking.*

FA 290 Ethics for Financial Services Professional: *Provides a practical framework for making ethical business decisions in the financial services industry.*

FA 271 Foundations of Estate Planning: *Offers an introduction to estate planning and the role life insurance plays in the estate planning process.*

FP 99 Certification Course and Exam: *This course is designed to be an overview of the major planning components that make up a comprehensive financial plan.*

COURSE DETAILS

ELECTIVE COURSES

FA 200 Techniques for Prospecting: Prospect or Perish

Using strategies to approach and meaningfully engage prospects turning them into clients.

Course Description:

FA 200 Techniques for Prospecting: Prospect or Perish teaches advisors industry proven methods for successfully identifying, selecting, and approaching prospects for financial products and services. The course covers procedures for creating prospect awareness, target marketing concepts, and prospect qualification and prioritization techniques. Strategic, tactical, and operational business planning processes are presented in detail. Professionalism and ethics are also explored throughout the course.

Course Highlights:

- *An insightful collection of prospecting strategies for advisors*
- *Overcome the psychological barriers to prospecting*
- *Learn innovative approaches to setting income and activity goals*
- *Learn and utilize effective contact management systems*

NB: *The FA 200 course is NOT a mandatory course for either the LUTCF or FSS designation. Upon successfully completing the course, students will receive a certificate of completion.*

FA 211 Essentials of Disability Income:

Course Description:

Disability income is a perfect complement to life insurance, offering cross-selling opportunities that increase agent productivity. This course examines disability income insurance and the related products of business buyout coverage, business overhead expense insurance, and long-term care insurance.

Course Highlights:

- *Demonstrates what it means to be a true income protection expert*
- *Reviews proven approaches used by the best in the business*
- *Teaches how to overcome common objections and close the sale*
- *Explains the critical need for disability income coverage*

ABOUT US

Trinidad and Tobago Association of Insurance & Financial Advisors (TTAIFA) provides education for Insurance & Financial Advisors in Trinidad &Tobago. Through a frame work of cooperation with the American College and the Centre for professional Development, the Association has provided open enrollment program delivery and facilitation services.

TTAIFA is also in the process of introducing new relevant programmes all in the continuing process of better educating and certifying students.

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