

FSS 262 – FOUNDATIONS OF FINANCIAL PLANNING: AN OVERVIEW

This Course provides an overview of the major component that make up a comprehensive financial plan, including the six step planning process:

Highlights:

- ÿ Insurance Planning
- ÿ Risk Management
- ÿ Employee Benefits Planning
- ÿ Investment Planning
- ÿ Income Tax Planning
- ÿ Retirement Planning and Estate Planning

Availability: Classroom
Length: 8 weeks and a final examination

FSS 263 - FOUNDATIONS OF FINANCIAL PLANNING: THE PROCESS

This course guides the financial planning advisor through the eight steps of the selling/ planning process, including identifying markets and prospects, communications skills needed to approach clients, information gathering through fact-finding, analyzing the information, developing and presenting the financial plan and implementing and servicing the land.

Highlights:

- ÿ Time value of money
- ÿ Financial Risk Tolerance
- ÿ Asset Allocation
- ÿ Financial Planning

Availability: Classroom
Length: 8 weeks and a final examination

FSS 264 – FOUNDATIONS OF INVESTMENT PLANNING

How this program will help you succeed?

Sales Training that teaches you:

“What to say, how to say it, and when to say it”

Basic planning concepts and needs in the personal financial services market.

Highlights:

- ÿ Effective Communications Skills
- ÿ Target Marketing
- ÿ Prospecting for new clients
- ÿ Making Sales Presentations

Planning Fundamentals, including:

- ÿ Estate Planning
- ÿ Financial Planning
- ÿ Investment Planning
- ÿ Retirement Planning
- ÿ Senior Planning

Products and Services, including:

- ÿ Annuities
- ÿ Business Insurance
- ÿ Disability Income Insurance
- ÿ Employee Benefits
- ÿ Life Insurance

Availability: Classroom
Length: 8 weeks and a final examination

TTAIFA Secretariat
129 Edward Street, Port of Spain.
Tel: 624-2940
Fax: 627-0208
Email: ttaifa@wow.net

DEFERRAL -\$600.00

Students may defer to another semester and must do so by the deadline date for the enrolment of that semester.

CANCELLATION -\$1,900.00

Option 1

Students may cancel their enrolment up to two weeks after the start of class. The cost of the text plus an administration fee would be deducted and the balance remitted to students.

Option 2

A credit can be given to students whereby they may retain their texts and re-enroll in that course at any time at no cost.

SUPPLEMENTAL -\$750.00

Students who miss the exam, or are not successful in the first writing of the examination will be eligible for the **NEXT** available sitting.

RE-ENROLMENT -\$1,600.00

Students who attain less than 40% or fail the supplemental examination can re-enroll for the next programme.

Replacements, Transfers, Cancellations, must be done within 2 weeks after the start of class. Text books must be returned in immaculate condition. If books are not in exceptional condition the cost of the text plus the cancellation fee would be deducted before a refund is given.

APPLICATION FOR ENROLMENT

Indicate enrolment year: 20_____

Indicate Semester below

Please Print or Type

Surname First Name Middle Initial

Branch/Agency Address

Office # _____ Cell # _____

E-Mail Address _____

I am registering for the following FSS Course

- 262 Foundations of Financial Planning: An Overview
- 263 Foundations of Financial Planning: The Process
- 264 Foundations of Investment Planning:

Please indicate where you would like to attend classes?

North South East Tobago

Payment method: Cash Cheque Company

Signature

Company Stamp

Authorised Signature

Date: _____

REGISTRATION INFORMATION:

Cost: \$ 2,500.00

COURSE REGISTRATION INFORMATION

JUNE 15th

Classes commence in September with examinations to be held in December.

OCTOBER 15th

Classes commence in January with examinations to be held in April.

FEBRUARY 15th

Classes commence in May with examinations to be held in August.

SUPPLEMENTAL REGISTRATION INFORMATION

January 31st - Exam in February

May 31st - Exam in June

September 30th - Exam in October

Applications will **NOT** be processed without **complete** information and full tuition fee being paid. Name should appear exactly as you want it on official documents.

**TRINIDAD AND TOBAGO
ASSOCIATION OF INSURANCE
AND FINANCIAL ADVISERS**

FSS

