

Chapter 10

“Insurance Cross Selling Opportunities in the Estate Planning Process”

Course Description: This course explores the broad spectrum of solutions and opportunities available to solve the living needs of clients in the estate planning process. The students will learn day to day practical applications of insurance from both an individual and family needs perspective. This course will be supplemented by the content author’s audio supportive material.

Content Author: Kenneth A. Parker, GEPC

Course Syllabus: Recommended Study Time = 1 Hours

Hour 1: Introduction and Course Outline
Effective Utilization of Life Insurance
10 Ways to Evaluate Insurance Needs
35 Top Reasons to Buy Life Insurance
One Solution May Not Be Enough
10 Estate Planning Common Mistakes to Avoid
Course Review and Summary