

## CE OPTION #1

### ONE DAY PROGRAM 20 credits - Classroom & Self Study with Exam

ALL CLASSES ARE 8:30 am - 5:00 pm REGISTRATION DEADLINE -14 DAYS PRIOR TO CLASS DATE

#### **NEW CLASSES !**

Understanding Annuities: A Basic Approach	Classroom	8 Credits
Retirement Planning Principles	Self Study	12 Credits

#### Courses Approved for:

LA (Life Accident & Health Agents), C1 (Life Consultants), LB (Life Accident & Health Brokers) Licenses

\*A 50 question proctored examination is given on the Self Study material mailed to you in advance.  
A passing grade of 70% is required on the self study exam in order to receive course credit.

**Nassau County** Marriott Long Island Hotel, 101 James Doolittle Blvd., Uniondale, NY 11553

CLASS DATES → 1/14/10 3/16/10 4/8/10 5/6/10 6/9/10 7/15/10

**Suffolk County** NY State Business Grp/Conf. Assoc., 180 East Main Street, Patchogue, NY 11772

CLASS DATES → 1/12/10 3/10/10 4/20/10 5/26/10 6/10/10 7/20/10

**New York City** Alliance of Insurance & Financial Professionals 989 Ave of the Americas, 6th Fl NY, NY 10018

CLASS DATES → 1/20/10 3/4/10 4/7/10 5/4/10 6/2/10 7/13/10

**Westchester** Pace University, Briarcliff Campus, 235 Elm Rd, Woodward Hall Room 214, Briarcliff, NY 10512

CLASS DATES → 11/11/09 1/27/10 3/30/10 4/27/10 5/27/10 6/30/10

## CE OPTION #2

### TWO DAY CLASSROOM PROGRAM 16 credits - Classroom Only - NO EXAM!

#### **NEW CLASSES !**

Retirement Planning Principles	Classroom	8 Credits
Understanding Annuities: A Basic Approach	Classroom	8 Credits

#### Courses Approved for

LA (Life Accident & Health Agents), C1 (Life Consultants), LB (Life Accident & Health Brokers) Licenses

**Nassau County** Marriott Long Island Hotel  
101 James Doolittle Blvd., Uniondale, NY 11553

**Suffolk County** NY State Business Grp/Conf. Assoc.  
180 East Main Street, Patchogue, NY 11772

CLASS DATES: 9/23/09 & 9/24/09	2/24/10 & 2/25/10	CLASS DATES: 2/10/10 & 2/11/10
11/18/09 & 11/19/09	5/18/10 & 5/19/10	4/13/10 & 4/14/10
	6/16/10 & 6/17/10	

**New York City** Alliance of Insurance & Financial Professionals 989 Ave of the Americas, 6th Fl , NY, NY 10018

CLASS DATES: 9/23/09 & 9/24/09 2/9/10 & 2/10/10 4/21/10 & 4/22/10 6/22/10 & 6/23/10  
11/18/09 & 11/19/09 3/24/10 & 3/25/10 5/12/10 & 5/13/10

## CE OPTION #3

### SELF STUDY ONLY PROGRAM

You can register to take 2 Self Study courses which requires 2 exams.

- The Self Study Courses are mailed to you and a proctored examination is given on each of the Self Study Courses.
- When you are ready to take your exams contact our office to schedule an appointment for exam monitoring.
- A passing grade of 70% is required on the self study exam in order to receive course credit.

## CE OPTION #4

### PARTIAL CREDITS ONLY PROGRAM

You can take either the self study course or just the classroom.

- self study materials will be mailed to you and a proctored examination is given on the Self Study Courses.

**OFFICES WITH 12 OR MORE INDIVIDUALS CAN SCHEDULE ON SITE CLASSES**

Contact: Karen Beno at (212) 221-3500, ext. 308 or via email at kbeno@taifp.com

**IMPORTANT INFORMATION WHEN REGISTERING FOR OUR CE CLASSES**

- **YOU MUST** supply a copy of ALL NYS and/or NJ licenses you want certification for WITH your registration form.
- **YOU MUST** sign in and sign out , and be on time or you will not receive credit for the class.
- Completion certificates will be mailed within 2 weeks of the class. Duplicate or lost certificates are \$25 for each .
- To change a CE class you are registered for to another scheduled class, there is a fee of \$25.

**CE REGISTRATION FORM Please PRINT CLEARLY.**

Payment and this form must be received in advance. Keep a copy for your records.

Fill in this form & fax back with credit card information to 212-764-8693 or mail check (with form) payable to: Center for Financial Studies, Att:CE Registration, 989 Avenue of the Americas,6th Fl, New York, NY 10018

	One Day Program	Two Day Program	Two Self Study	Self Study or Classroom
Non Members	\$190	\$255	\$190	\$145
AIFA, SFSP Members	\$165	\$230	\$165	\$120

**CE OPTION #1** Please Indicate which ONE DAY PROGRAM (20 credits - Classroom & Self Study with Exam) you are registering for:  
Location \_\_\_\_\_ Date \_\_\_\_\_

**CE OPTION #2** Please Indicate which TWO DAY PROGRAM (16 credits - 2 Classroom Courses- No Exam) you are registering for:  
Location \_\_\_\_\_ Date \_\_\_\_\_

**CE OPTION #3** SELF STUDY ONLY 2 Self Study Courses - 2 Exams - Call for available courses. Materials will be shipped to you. When you are ready for the exam call (212) 221-3500 for an appointment for exam monitoring.

**CE OPTION #4** CHECK ONE: [ ] SELF STUDY ONLY [ ] CLASSROOM ONLY  
Location \_\_\_\_\_ Date \_\_\_\_\_

Name: \_\_\_\_\_ Last 4 digits of Social Security #: \_\_\_\_\_

License#: \_\_\_\_\_

**REGISTER USING THE ADDRESS YOU WOULD LIKE YOUR SELF STUDY MATERIAL AND/OR COMPLETION CERTIFICATES MAILED TO**

Company (if using business address): \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

**\* YOU MUST SEND COPIES OF YOUR NYS/NJ INSURANCE LICENSE(S) WITH THIS FORM!**

Amount \$ \_\_\_\_\_ o Check Enclosed o Please charge my credit card o MC/ Visa o AMEX

Print name card \_\_\_\_\_ Signature \_\_\_\_\_

Card Number \_\_\_\_\_ Exp. Date \_\_\_\_\_ Visa Cards, supply 3 digit CVV on back \_\_\_\_\_

**\*You MUST be on time and in the classroom to receive credit for these courses.**

Questions? Please call 212-221-3500, ext. 0 or 631-584-6715, ext. 0

**CANCELLATIONS MUST BE MADE IN WRITING**

**WEB0910**

**Cancellation Policy - Cancellations must be made in writing.**

- If a cancellation is received up to two weeks prior to the scheduled program a full refund minus a cancellation fee of \$25.00 will be charged.
- 25% of course fee will be forfeited if written cancellation request is received between the periods of 24 hours and two weeks prior to the scheduled program **plus** a \$25.00 cancellation fee.
- Full forfeiture of course fee if a cancellation request is received within 24 hours of scheduled program or if registrant does not attend the scheduled course. Certain exceptions will be considered to the above referenced refund schedule and policy depending upon the nature and circumstances surrounding the written cancellation request.