

Take up to **Eight Fewer Courses**

Benefit from Duplicate Requirements

Once you have earned one designation, it is easy to achieve additional designations because the programs share many of the same courses. Following any of the course sequences shown will help you achieve multiple designations in less time.

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"I passed 351 this morning and have now earned my CASL® designation in addition to my CLU® and ChFC®. I just wanted to let you know that I am a firm believer in your materials, passing eleven classes in less than three years, with a 100% passing rate!"

—Gene P. Berry, CASL, CLU, ChFC

Course Sequence **A**

1 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

2 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

3 CASL® Courses:

5 Required Courses (Take 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

Course Sequence **B**

1 CASL® Courses:

5 Required Courses (Take all five)	
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

2 ChFC® Courses:

7 Required Courses (Take the five highlighted)	
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 one highlighted)	
322	The Financial System in the Economy
334	Estate Planning Applications
352	Financial Decisions for Retirement

3 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

Course Sequence **C**

1 CLU® Courses:

5 Required Courses (Take all five)	
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 (Take the three highlighted)	
300	Financial Planning: Process and Environment
321	Income Taxation
326	Planning for Retirement Needs
328	Investments
334	Estate Planning Applications

2 ChFC® Courses:

7 Required Courses (Take the three highlighted)	
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 one highlighted)	
322	The Financial System in the Economy
334	Estate Planning Applications
352	Financial Decisions for Retirement

3 CASL® Courses:

5 Required Courses (Take 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