



INSURANCE ACHIEVEMENT

Take on the Toughest Concepts with
Confidence – with Videos.

KAPLAN SCHWESER

Insurance Achievement Video Library

- Your online access for your Essential Study Solution will include the videos listed below for your course.
- The videos are designed to help you understand the more difficult concepts for each course.
- There is an average of seven videos per course.
- The videos are focused and easy to grasp, averaging 10 to 15 minutes in length.
- All videos are written and produced by one of our Insurance Achievement faculty.



Total number of videos you
will have access to:

CLU®	47	CPCU®	40
ChFC®	46	CASL®	27

300: Financial Planning: Process and Environment (4)

Regulation of Financial Institutions
Using a Financial Calculator During Your Exam
Using Gifts in Estate Planning
Using the Marital Deduction in Estate Planning

311: Fundamentals of Insurance Planning (19)

Approaching Course 311: Fundamentals of Insurance Planning
Agency Relationships
Annuities
Cash Value Life Insurance
Continuation of Coverage
Individual Medical Expense Insurance
ISO Flood Coverage Endorsement for Commercial Property
Law of Torts
Managed Care Plans
National Flood Insurance Program (NFIP) Coverage for Commercial Property
Risk and Insurance: Defined and Distinguished
Selling Life Insurance Using Illustrations
Standard Policy Provisions
Term Insurance

The Fundamentals of Umbrella Liability Insurance
Traditional Medical Expense Coverage
Understanding Personal Umbrella Policies and the Self-Insured Retention (SIR)
Understanding Tort and Contract Remedies
Variations of Cash Value Insurance

321: Income Taxation (7)

Alternative Minimum Tax
Annuities
Capital Gains Tax and Holding Period
Exclusions from Gross Income
Tax on Sale of Personal Residence
Understanding the Kiddie Tax
Wash Sale Rules

322: The Financial System in the Economy (4)

Affecting the Economy: Monetary Policy and Fiscal Policy
Defined Benefit Plans vs. Defined Contribution Plans
Pension Plans: Key Features and Kinds
Regulation of Financial Institutions

323: Individual Life Insurance (9)

Annuities
Cash Value Life Insurance
Optional Policy Provisions and Policy Riders for Life Insurance
Selling Life Insurance Illustrations
Standard Policy Provisions
Taxation of Life Insurance Death Benefits
Term Insurance
Using a Financial Calculator During Your Exam
Variations of Cash Value Insurance

324: Life Insurance Law (6)

Agency Relationships
Law of Torts
Optional Policy Provisions and Policy Riders for Life Insurance
Standard Policy Provisions
Understanding Tort and Contract Remedies
Waiver and Estoppel in Insurance

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**326: Planning for Retirement Needs (4)**

Defined Benefit Plans vs.
 Defined Contribution Plans
 Meeting Retirement Needs: Projecting
 Needs, Planning Savings
 Pension Plans: Key Features and Kinds
 Traditional and Roth IRAs

328: Investments (9)

Approaching Course 328: Investments
 Bond Yields: Ups and Downs in the Bond Market
 Capital Gains Tax and Holding Period
 Equity Investments
 Investment Company Shares
 Mutual Fund Ownership
 Mutual Funds
 Risk Measures
 Using a Financial Calculator During Your Exam

330: Fundamentals of Estate Planning (14)

Approaching Course 330: Fundamentals
 of Estate Planning
 Calculating the Federal Estate Tax
 Charitable Giving – Federal Gift and Estate Tax
 Defining the Gross Estate
 Duties, Powers, and Liabilities of Trustees
 Estate Planning – Basic Documents
 Fundamentals of Trusts
 General Probate Process
 GRATs and GRUTs: Estate Reduction Using
 Qualified Retained Interests
 Living and Testamentary Trusts
 Probate Estate and Federal Gross Estate:
 How Do They Compare?
 Understanding the Kiddie Tax
 Using Gifts in Estate Planning
 Using the Marital Deduction in Estate Planning

**331: Planning for Business Owners
and Professionals (5)**

Alternative Minimum Tax
 Defined Benefit Plans vs. Defined
 Contribution Plans
 General Probate Process
 GRATs and GRUTs: Estate Reduction Using
 Qualified Retained Interests
 Probate Estate and Federal Gross Estate:
 How Do They Compare?

332: Financial Planning Applications (5)

Commercial General Liability (CGL) Insurance:
 Occurrence vs. Claims-made Coverage
 Meeting Retirement Needs: Projecting
 Needs, Planning Savings
 Pension Plans: Key Features and Kinds
 Traditional and Roth IRAs
 Using a Financial Calculator During Your Exam

334: Estate Planning Applications (12)

Calculating the Federal Estate Tax
 Charitable Giving – Federal Gift and Estate Tax
 Defining the Gross Estate
 Duties, Powers, and Liabilities of Trustees
 Estate Planning – Basic Documents
 Fundamentals of Trusts
 General Probate Process
 GRATs and GRUTs: Estate Reduction Using
 Qualified Retained Interests
 Living and Testamentary Trusts
 Understanding the Kiddie Tax
 Using Gifts in Estate Planning
 Using the Marital Deduction in Estate Planning

350: Understanding the Older Client (0)**351: Health and Long-Term Care
Financing for Seniors (1)**

Annuities

352: Financial Decisions for Retirement (6)

Annuities
 Defined Benefit Plans vs. Defined
 Contribution Plans
 Meeting Retirement Needs: Projecting
 Needs, Planning Savings
 Pension Plans: Key Features and Kinds
 Tax on Sale of Personal Residence
 Traditional and Roth IRAs

**CPCU 510: Foundations of Risk Management,
Insurance, and Professionalism (7)**

Commercial General Liability (CGL) Insurance:
 Occurrence vs. Claims-made Coverage
 Mastering Your CPCU Essay Exam
 Risk and Insurance: Defined and Distinguished
 The Fundamentals of Umbrella Liability Insurance
 Understanding Personal Umbrella Policies
 and the Self-Insured Retention (SIR)
 Valuation Options for Building and Personal
 Property Coverage
 Waiver and Estoppel in Insurance

**CPCU 520: Insurance Operations, Regulation,
and Statutory Accounting (5)**

Agency Relationships
 Commercial General Liability (CGL) Insurance:
 Occurrence vs. Claims-Made coverage
 Law of Torts
 Understanding Tort and Contract Remedies
 Waiver and Estoppel in Insurance

**CPCU 530: The Legal Environment
of Insurance (3)**

Agency Relationships
 Law of Torts
 Understanding Tort and Contract Remedies

**CPCU 540: Finance for Risk Management
and Insurance Professionals (5)**

Annuities
 Capital Gains Tax and Holding Period

**CPCU 551: Commercial Property Risk
Management and Insurance (9)**

Builders Risk Insurance
 Commercial Property Coverage Forms: How Do
 They Compare?
 Coverage Options for Commercial
 Property Policies
 Earthquake and Volcanic Eruption Coverage
 ISO Flood Coverage Endorsement for
 Commercial Property
 Loss Exposures For Property In Transit
 Mastering Your CPCU Essay Exam
 National Flood Insurance Program (NFIP)
 Coverage for Commercial Property
 Valuation Options for Building and Personal
 Property Coverage

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CPCU 552: Commercial Liability Risk Management and Insurance (6)

Commercial General Liability (CGL) Insurance:
 Occurrence vs. Claims-made Coverage
 Law of Torts
 Loss Exposures For Property In Transit
 Mastering Your CPCU Essay Exam
 The Fundamentals of Umbrella Liability Insurance
 Understanding Tort and Contract Remedies

CPCU 553: Survey of Personal Risk Management, Insurance, and Financial Planning (28)

Annuities
 Calculating the Federal Estate Tax
 Capital Gains Tax and Holding Period
 Cash Value Life Insurance
 Charitable Giving – Federal Gift and Estate Tax
 Continuation of Coverage
 Defining the Gross Estate
 Duties, Powers, and Liabilities of Trustees
 Estate Planning – Basic Documents
 Fundamentals of Trusts
 General Probate Process
 Individual Medical Expense Insurance
 Law of Torts
 Living and Testamentary Trusts
 Managed Care Plans
 National Flood Insurance Program (NFIP)
 Coverage for Commercial Property
 Optional Policy Provisions and Policy Riders
 for Life Insurance
 Pension Plans: Key Features and Kinds
 Probate Estate and Federal Gross Estate:
 How Do They Compare?
 Risk and Insurance: Defined and Distinguished
 Term Insurance

Traditional Medical Expense Coverage
 Understanding Personal Umbrella Policies and
 the Self-Insured Retention (SIR)
 Understanding the Kiddie Tax
 Understanding Tort and Contract Remedies
 Using Gifts in Estate Planning
 Using the Marital Deduction in Estate Planning
 Variations of Cash Value Insurance

CPCU 555: Personal Risk Management and Property-Liability Insurance (3)

Law of Torts
 Mastering Your CPCU Essay Exam
 Understanding Tort and Contract Remedies

CPCU 556: Personal Financial Planning (25)

Mastering Your CPCU Essay Exam
 Alternative Minimum Tax
 Annuities
 Bond Yields: Ups and Downs in the Bond Market
 Calculating the Federal Estate Tax
 Capital Gains Tax and Holding Period
 Cash Value Life Insurance
 Charitable Giving - Federal Gift and Estate Tax
 Defined Benefit Plans vs.
 Defined Contribution Plans
 Defining the Gross Estate
 Duties, Powers, and Liabilities of Trustees
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 Meeting Retirement Needs: Projecting Needs,
 Planning Savings

Pension Plans: Key Features and Kinds
 Probate Estate and Federal Gross Estate:
 How Do They Compare?
 Term Insurance
 Traditional and Roth IRAs
 Understanding the Kiddie Tax
 Using Gifts in Estate Planning
 Using the Marital Deduction in Estate Planning
 Variations of Cash Value Insurance

CPCU 557: Survey of Commercial Risk Management and Insurance (11)

Builders Risk Insurance
 Commercial General Liability (CGL) Insurance:
 Occurrence vs. Claims-made Coverage
 Commercial Property Coverage Forms: How Do
 They Compare?
 Coverage Options for Commercial Property
 Policies
 Earthquake and Volcanic Eruption Coverage
 Law of Torts
 Loss Exposures For Property In Transit
 Risk and Insurance: Defined and Distinguished
 The Fundamentals of Umbrella Liability Insurance
 Understanding Tort and Contract Remedies
 Valuation Options for Building and Personal
 Property Coverage

CPCU 560: Financial Services Institutions (6)

Mastering Your CPCU Essay Exam
 Affecting the Economy: Monetary Policy
 and Fiscal Policy
 Annuities
 Bond Yields: Ups and Downs in the Bond Market
 Pension Plans: Key Features and Kinds
 Regulation of Financial Institutions

The above list of videos is accurate as of January 25, 2010. Videos will be both added and deleted over time.

