

WARNER

SCHOOL OF SUCCESS

MASTER • GROW • DISCOVER



2023

MASTER CURRICULUM

CAREER-BOOSTING AND CONTINUING EDUCATION COURSES

WHO WOULD BENEFIT FROM THIS COURSE?

Course Name States (CA, CO, OK, TX)	Type of Course	New Brokers & Agents	Seasoned Brokers & Agents	Account Managers	Date/Time
<u>Selling on Social Media</u> <i>New!</i> In Andy Neary's "Selling on Social Media" course you will see how you can turn LinkedIn into a business-generating machine. Andy will demonstrate how to use the platform to stand out from your competition. This course is for all states.	Career Boosting	U	U	U	3/15/23 10 AM PST <small>*COMPLETE*</small>
<u>Level Funding 101</u> This course is designed to help insurance professionals understand the basics of level funding to more effectively educate their clients and identify when level funding is the viable solution. This course is for all states.	C.E.	U	U	U	3/29/23 9 AM PST <small>*COMPLETE*</small>
<u>Legal Update: Are You Ready for 2023</u> <i>New!</i> Are you struggling to keep up with all the changes in federal benefits laws — and what you have to do to implement them? This webinar will provide you with a timely update on the most essential new developments. This course is for all states.	Career Boosting	U	U	U	4/5/23 9 AM PST <small>*COMPLETE*</small>
<u>Insurance Basics 101</u> With so many new brokers and agents and staff members entering the health insurance marketplace, there is a need for basic training: insurance terminology, including those related to benefit coverage, networks and premiums rating. In addition, in-depth industry expertise is needed for brokers and agents to maintain and grow their book of business. This course is for all states.	C.E.	U		U	4/19/23 9 AM PST
<u>Self-Funded 101</u> This course is designed to help insurance professionals understand the basics of some of the different self-funding solutions that are offered in today's insurance markets. You will walk away with an understanding of level funded, reference-based pricing, captives, and self-funding. This course is for all states.	C.E.	U		U	5/3/23 9 AM PST

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<u>Medicare Business Essentials</u> <i>New!</i> In this course, Medicare brokers and agents will be assisted in maximizing their business plans. Topics include: setting business goals, creating an actionable business plan, sales and marketing tips, generating referrals, and the secret sauce to building a solid book of business - client retention. This course is for all states.	Career Boosting	U	U	U	5/31/23 9 AM PST
<u>Best Practices for Navigating Mid-Market</u> This course will help you understand what makes mid-market different from the small group market. We'll also teach you how carriers view mid-size employer groups, what they need to know about your client to market the account, and what best practices will provide your client with the best results. This course is for California only.	C.E.	U	U	U	6/21/23 9 AM PST
<u>Living Your Code of Ethics</u> Understand and explore the ethical situations insurance professionals encounter, while fulfilling your three-hour C.E. requirement. In this course, you'll get engaging instruction about ethical issues, including these topics: High character that drives business success, obligations to carriers vs. clients, ethical standards within a broker's business model, and more. This course is for California, Colorado and Texas only.	C.E.	U	U	U	7/11/23 9 AM TO 12 PM
<u>Selling Long Term Disability</u> This course is designed to help insurance professionals understand the basics of LTD and introduce them to an essential ancillary coverage to present their clients. Instruction will include different benefit and contribution options, benefit durations, definition of disability, pre-existing conditions, eligibility, information needed to quote, etc. This course is for all states.	Career Boosting	U	U	U	7/12/23 9 AM PST

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Medicare 101 This course will help brokers and agents learn the basics of Medicare and the types of products available to those who are Medicare-eligible. It will also earn a 1 hour of continuing education credit towards an agent's license renewal. This course is for all states.	C.E.	U		U	7/19/23 9 AM PST
PRO Apply 101 Familiarize yourself with the PRO Apply tool for setting up groups for electronic enrollment of the carrier applications. You will see the ease of use and flexibility of PRO Apply and how you can use it to guide your clients through the process of enrolling for coverage for their employee benefits. This course is for all states.	Career Boosting	U	U	U	7/26/23 9 AM PST
PRO Quote 101 Familiarize yourself with the flow of creating a proposal in PRO Quote. You will see the ease of use and flexibility of PRO Quote and how you can use it to guide your clients through the process of choosing the best benefits for their employees. This course is for all states.	Career Boosting	U	U	U	8/23/23 9 AM PST
PRO Provider 101 Familiarize yourself with looking up providers in the PRO Provider tool. You will see the ease of use and flexibility of PRO Provider and how you can use it to guide your clients through the process of choosing the right carrier or carriers for their employee benefits. This course is for CA and CO.	Career Boosting	U	U	U	8/30/23 9 AM PST
Carrier 411: <i>New!</i> A Warner Pacific Technology Tool Learn how to use one of Warner Pacific's tech tools, the NEWLY DESIGNED Carrier 411. Data library for easy access to the most up-to-date carrier information and guidelines. You'll master the Custom Questions Index and create QuickLists for instant searches and learn to personalize your reports to share with your clients. This course is for all states.	Career Boosting	U	U	U	8/31/23 9 AM PST

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<u>Document Toolkit: <i>New!</i></u> <u>A Warner Pacific Technology Tool</u> <p>Learn how to use the NEWLY REDESIGNED Warner Pacific technology tool, The Document Toolkit, to find and share multiple documents with ease. Select and download rate sheets, underwriting guidelines and commission schedules—and more—in one convenient place. Then, easily share the files seamlessly with live hyperlinks.</p> <p>This course is for all states.</p>	Career Boosting	U	U	U	9/6/23 9 AM PST
<u>What to Expect When You Move from Fully Insured to Level Funding</u> <i>New!</i> <p>Level-funded health plans have some significant advantages over fully-insured health plans, but they come with new and different responsibilities and concerns.</p> <p>In this class we'll explain those responsibilities and concerns, and outline the key differences, so you can avoid unexpected surprises while quoting, installing, servicing and renewing your clients' level funded health plans.</p> <p>This course is for all states.</p>	Career Boosting	U	U	U	9/7/23 9:30 AM PST
<u>Group Benefits vs Medicare Benefits</u> <i>New!</i> <p>This course will go over the main differences in the group and Medicare benefits market.</p> <p>This course is for all states.</p>	C.E.	U	U	U	9/13/23 9 AM PST
<u>Creating Championship Content</u> <i>New!</i> <p>To Learn the two types of content that will have your prospects reaching out to you. This course will show how to build relationships by leveraging the power of creating consistent content.</p> <p>This course is for all states.</p>	Career Boosting	U	U	U	9/27/23 10 AM PST

What are Career Boosting Courses?

Whether you're new to the industry or a 20-year veteran, our Career Boosting courses provide tips and information that you can apply immediately.



What are Continuing Education Courses?

These courses help fulfill the continuing education credit hours required for brokers and agents to renew their state Life & Health license.





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More courses will be added on a continual basis.

For more information, visit warnerpacific.com

Online registration is coming soon. In the meantime,
please register directly via email invitation.

If you have any questions, please contact our Warner Pacific
Training Expert at Paul.Sangalang@warnerpacific.com.