WARNER U

SCHOOL OF SUCCESS®

2025

CURRICULUM

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CAREER-BOOSTING AND CONTINUING EDUCATION COURSES

Course Name	Type of Course	Target Audience Learning Tracks	Date/ Time
Legislative & Regulatory Update Discover what's in store for our industry in this insightful course. Over the next four years, significant changes are anticipated within legislation and regulations at both the federal and state levels. As a broker, being informed about upcoming changes to federal and state developments that affect your clients is crucial. Join us to explore the new and pending laws, proposals, and regulations and gain valuable insights into what they mean for you and your clients. This course is for all states.	Career Boosting	Principal Manager/Leader Broker Account Manager	3/12/25 9 AM PT
New! **ACA Basics** The Affordable Care Act (ACA) turns 15 in 2025, an important milestone for this ground-breaking legislation. Let's take a look back at how the ACA got started, what it accomplished, and how it changed individual, small group, and large group coverage. This course is for all states. Please check the website for state C.E. credit availability.	C.E.	Broker Account Manager	3/18/25 9 AM PT
The ACA: The Latest and Greatest Through legislation, regulations, and implementation, the ACA continues to evolve. At the same time, the IRS is sending out penalty notices (such as 226J letters), and HHS is stepping up its enforcement role. This environment provides HR and producers with challenges and opportunities. This program will provide an update on the latest ACA developments, break down the specific aspects of the law that HR really needs to focus on, and help you meet on-going compliance challenges so you are ready for an IRS audit, a business merger, or the next round of new developments. This course is for all states. Please check the website for state C.E. credit availability.	C.E.	Broker Account Manager	3/20/25 9 AM PT
New! **COBRA - Federal** Continuation coverage is important to employees, places legal obligations on employers, and is an essential component of both fully insured and self-funded health plans. Therefore, producers and employers need to understand how the coverage works and how it is administered. This program will help attendees identify which employers are subject to COBRA and when employees are eligible for these benefits. Key administrative tasks will be explained, such as essential notice requirements, setting premiums, and the bases for early termination of coverage. This course is for all states.	TBD	Broker Account Manager	3/26/25 9 AM PT

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Course Name	Type of Course	Target Audience Learning Tracks	Date/ Time
New! **Cal COBRA** Continuation coverage is an important benefit to employees, places legal obligations on employers, and is an essential component of fully insured health plans. Both producers and employers need to understand how the coverage works and how it is administered. This program will help attendees identify which plans and employers are subject to Cal-COBRA and when employees are eligible for these benefits. Key administrative tasks will be explained, such as essential notice requirements, premiums, and the bases for early termination of coverage. Key differences, as well as the interrelationship, between COBRA and Cal-COBRA will also be highlighted. This course is for CA only.	Career Boosting	Broker Account Manager	3/26/25 ON DEMAND
New! **CAA and the No Surprises Act** Demystify the essentials of the Consolidated Appropriations Act (CAA) 2021: What it is, what you need to know, key actions, and how to support your groups. Including gag clause rules, transparency, and more. This webinar will provide you with a timely update on key elements of the law and the most essential new developments. This course is for all states. Please check the website for state C.E. credit availability.	C.E.	Broker Account Manager	4/2/25 9 AM PT
Funding Playbook: Introduction to Level Funding This course is designed to go over the basics of level funding and the requirements needed to make it successful. It also includes important information about which clients are appropriate for this health plan solution and how you can incorporate it into your portfolio, as well as the difference in employer responsibilities for fully insured vs. level funded plans. This course is for all states. Please check the website for state C.E. credit availability.	C.E.	Broker Account Manager	4/16/25 9 AM PT
Funding Playbook: Introduction to Self-Funding This course is designed to help brokers understand the basics of self-funding, including contracts and the ways it can be offered in markets across the country. Walk away with an understanding of self-funding alternatives, including plans self-funded through carriers and those that use TPAs to administer claims. This course is for all states. Please check the website for state C.E. credit availability.	C.E.	Broker Account Manager	4/29/25 9 AM PT

CAREER-BOOSTING AND CONTINUING EDUCATION COURSES

Course Name	Type of Course	Target Audience Learning Tracks	Date/ Time
New! **Funding Playbook: Advanced Self-Funding** This course builds on the introductory course and discusses PBM selection, direct provider contracting, bundled disease arrangements, TPA selection, Captives, claims analytics and more. Knowledge of self-funding is essential for those taking this course. This course is for all states.	TBD	Broker Account Manager	5/1/25 9 AM PT
Funding Playbook: Putting Your Knowledge Into Action: Case Studies, Level Funding & Large Group How can you navigate large group and mid-market requests? We'll help you understand what makes large group and 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 all states.	Career Boosting	Broker Account Manager	5/7/25 9 AM PT
Introduction to Mental Health Parity Compliance The Mental Health Parity Final Rules were released, marking one of the largest regulatory updates on mental health parity compliance in recent years. Want to skip the 100+ page read and find out what you need to know for your plan going forward? Join Jennifer S. Burman, JD, MBA, and CEO of MZQ Consulting for this Warner U course to learn about the changes to mental health parity compliance coming in 2025, as well as what stayed the same for NQTL and QTL testing compliance. Be ready to take notes and ask questions. We will do our best to provide all the answers you need as well as resources to further assist. This course is for all states.	Career Boosting	Principal Manager/Leader Broker Account Manager	5/14/25 9 AM PT
Leveraging AI This 30-minute course aims to provide business professionals with an introduction to understanding and leveraging AI. This course will touch on some applications, ideas on business strategy and emerging trends relating to AI. Participants will learn how to think strategically about integrating AI into their business operations. This course is for all states.	Career Boosting	Broker Account Manager	5/20/25 9 AM PT

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Course Name	Type of Course	Target Audience Learning Tracks	Date/ Time
ERISA Demystified: A Comprehensive Overview Get to know ERISA a little bit better! In this program, we will talk about what ERISA is, how it applies to health and welfare plans, what compliance obligations it places on employers, and what that all means to producers. We will address common myths, clear up misunderstandings, and set you on the path to ERISA enlightenment so you can better assist your clients with their compliance obligations. This course is for all states. Please check the website for state C.E. credit availability.	C.E.	Principal Manager/Leader Broker Account Manager	5/22/25 9 AM PT
The PRO Series: PRO Quote 101 The overall objective of this course is to familiarize students 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. You can look forward to a live demo of PRO Quote, including the latest product enhancements and best practices. This class will kick off our trio on the PRO Quote curriculum, followed by PRO Quote 201 and 301 in June! This course is for all states.	Career Boosting	Broker Account Manager	5/28/25 9 AM PT
The PRO Series: PRO Quote 201 The overall objective of this course is to build on the skills learned in PRO Quote 101. In this class, we will teach you how to create and customize small group quotes just the way you want them. This class is designed for people who have completed the PRO Quote 101 course, or those familiar with the PRO Quote quoting process. This course is for all states.	Career Boosting	Broker Account Manager	6/4/25 9 AM PT
The PRO Series: PRO Quote 301 The overall objective of this course is to build on the skills learned in PRO Quote 101 & 201. In this class, we will teach you how to create and customize small group quotes just the way you want them. This class is designed for people who have completed the PRO Quote 101 & 201 courses, or those familiar with the PRO Quote quoting process. This course is for all states.	Career Boosting	Broker Account Manager	6/11/25 9 AM PT
New! **Strategies For Alternative Solutions: What To Do If The Usual Strategies Don't Fit** Develop foundational sales skills and gain confidence when handling unique cases. Learn about new and alternative ways to provide your clients with coverage that is meaningful to employees, meets regulatory requirements, and is affordable for employers. This course is for all states.	Career Boosting	Broker Account Manager	6/11/25 ON DEMAND

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CAREER-BOOSTING AND CONTINUING EDUCATION COURSES

Course Name	Type of Course	Target Audience Learning Tracks	Date/ Time
The PRO Series: PRO Provider 101 The overall objective of this course is to familiarize students 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, CO, FL and TX.	Career Boosting	Broker Account Manager	6/18/25 9 AM PT
The PRO Series: PRO Apply 101 Built for speed and accuracy, Warner Pacific's PRO Apply is your convenient alternative to paper-based enrollments. In this course, you'll learn how easy it is to conduct paperless enrollment with quick turnarounds and smart processing that reduces errors and omissions. This course is for CA, CO and TX.	Career Boosting	Broker Account Manager	6/25/25 9 AM PT
Living Your Code of Ethics Understand and explore the ethical situations insurance professionals encounter while fulfilling your ethics C.E. requirement. Get an engaging education on ethics that touches on: - High character that drives business success - Obligations to carriers vs. clients - Ethical standards within a broker's business model - Building and cultivating trust - HIPAA, privacy and security This course is for all states. Please check the website for state C.E. credit availability.	C.E.	Principal Manager/Leader Broker Account Manager	7/9/25 9 AM PT
MEC 101 MEC 101 is designed to address the basics of MEC plans and their important role in providing affordable, compliant healthcare coverage for employers. In addition to the basics of MEC plans, this session will address their role in the regulatory environment and practical ideas to address the complex needs of your clients. You won't want to miss this session to learn how to add these important plans to your product portfolio. This course is for all states.	Career Boosting	Broker Account Manager	7/9/25 ON DEMAND
New! **Case Studies Using MEC** Are you interested in understanding how using Minimum Essential Coverage plans (MEC) can fit into your portfolio? This hands-on course will talk about how using MEC plans can increase client satisfaction and maximize your earning potential. Presented by Matt Kincaid from Apex with our very own Janet Trautwein. This course is for all states.	Career Boosting	Broker Account Manager	7/16/25 ON DEMAND

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Cyber Security 101 An overview of cybersecurity threats and best practices specific to the health insurance industry, empowering participants to recognize and mitigate potential risks to safeguard sensitive data. This course is for all states. Please check the website for state C.E. credit availability.	C.E.	Principal Manager/Leader Broker Account Manager	7/30/25 9 AM PT
New! **Getting Ready for Q5: Warner Capabilities** Prepare for a successful Q5 with an overview of Warner Pacific's tools and resources. Learn how to leverage our capabilities to streamline your processes and maximize opportunities during the busiest season. This course is for all states.	Career Boosting	Broker Account Manager	8/6/25 9 AM PT
New! **PEO Basics** Course description coming soon. This course is for all states.	Career Boosting	Broker Account Manager	8/13/25 9 AM PT
Insurance Basics 101 With so many new agents and agency 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 agents/agencies to maintain and grow their book of business. This course is for all states. Please check the website for state C.E. credit availability.	C.E.	Broker Account Manager	8/20/25 9 AM PT
BenAdmin/TPA Market Options This course offers a high-level overview of BenAdmin and TPA solutions, including key features, differences and partnership opportunities. Gain valuable insights to navigate the market and explore ways to streamline benefits administration through these services. This course is for all states.	TBD	Principal Manager/Leader Broker	8/27/25 9 AM PT
New! **Efficient Group Submissions Made Simple** Master expert tips and strategies for streamlining case submissions. This course covers best practices for efficient group submissions, helping you save time and improve accuracy in the process. This course is for all states.	Career Boosting	Principal Manager/Leader Broker	9/3/25 9 AM PT

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Medicare Sales Essentials: From Leads to Lasting Clients In this session, we will assist Medicare brokers with 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	Broker Account Manager	9/10/25 9 AM PT
Medicare 101 This course will help insurance agents learn the basics of Medicare and the types of products available to those who are Medicare-eligible. It also offers 1 hour of continuing education credit toward an agent's license renewal. This course is for all states. Please check the website for state C.E. credit availability.	C.E.	Broker Account Manager	9/17/25 9 AM PT
Guarantee Issues and SEPs in CA 2025 This course will help insurance agents understand the changes to CMS rules and guidelines and plan availability in the Medicare marketplace, and better equip them to use technology to satisfy CMS rules and extend their Medicare opportunities. This course and C.E. is for California only.	C.E.	Principal Manager/Leader Broker Account Manager	9/24/25 9 AM PT
Group Benefits vs. Medicare Benefits We will discuss guidelines of group health plans for the Medicare-entitled working-aged. The decision process for staying on the group plan vs. waiving the GHP and enrolling in a Supplement plan. This course will help insurance agents learn the basics of Medicare and the types of products available to Medicare-eligibles. This course is for all states. Please check the website for state C.E. credit availability.	C.E.	Broker Account Manager	10/8/25 9 AM PT
2025 Forms 1094/1095: A How-To-Guide The rules surrounding the ACA's §4980H shared responsibility penalties and IRS Forms 1094/1095 reporting are complex. The obligation to understand the law — and the obligation to fill out the forms correctly and on time — rests with the employer, and the consequences to the employer of getting it wrong are significant. This program will start with an overview of the §4980H penalties and will then, using real world examples, walk attendees through the process for completing the 2025 Forms 1094/1095. Common pitfalls will be addressed and common questions will be answered. In the program we will also discuss: • The relationship between the §4980H penalties and completing the Forms 1094/1095 • The rapidly approaching deadlines to furnish and file the 2025 Forms 1094/1095 • New IRS rules requiring electronic filing of the forms • Mandatory state filings (including FTB filings) • The relationship between the §4980H penalties and completing the Forms 1094/1095 This course is for all states. Please check the website for state C.E. credit availability.	C.E.	Principal Manager/Leader Broker Account Manager	12/9/25 9 AM PT

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.

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