



# The Success Family of CE Companies

*Online Continuing Education for Insurance, Claims Adjusters, CFP, CPA, CIMA, & Professional Recertification Program (PRP)*

*Pre-Licensing for Insurance (Life/Health & Property/Casualty) and Securities (Series 6, 7, 24, 26, 63, 65, 66)*

*Verification, Tracking, and Compliance Solutions CE, License Renewals, plus, Annuity Suitability and Product-Specific Training*

*Success Live CE (Instructor-Led) Courses and Administration tools to Track & Verify your agents course completions*

Your **One Source** for All Continuing Education, Pre-Licensing, Product-Specific Training, and Compliance Solutions for Your Company

SUCCESS CE • SUCCESS LIVE CE • AFFORDABLE CE

[www.SuccessCE.com](http://www.SuccessCE.com)



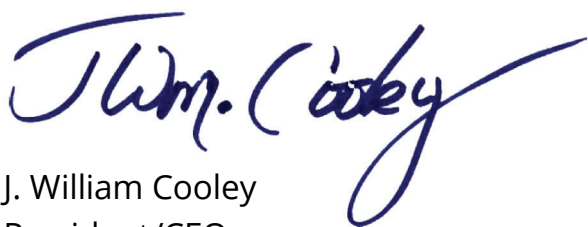
# A Message from the President/CEO

Thank you for your interest in The Success Family of CE Companies!

Since 1984, we have believed that exceeding the expectations of our clients with our “state of the art” technology, courses, administrative tools, ease of use, and customer service enhances our reputation as the leader in providing continuing education and pre-licensing solutions that are budget-friendly and provide superior value to you and your company.

You have my personal guarantee that whether you are currently a client, or become a client, you will be continually pleased with our products and services.

Sincerely,

A handwritten signature in blue ink that reads "J. William Cooley". The signature is fluid and cursive, with a long, sweeping underline that extends to the right.

J. William Cooley  
President/CEO

The Success Family of CE Companies

# Table of Contents

|   |    |
|---|----|
| About the Success Family of CE Companies . . . . .  | 2  |
| Summary of Products & Services . . . . .  | 3  |
| Online Life/Health, Property/Casualty Insurance,<br>Claims Adjusters, CFP, CLU/ChFC, CPA, and CIMA Continuing Education . . . . . | 4  |
| Success Management System (SMS)<br>Administration and Tracking of Online CE . . . . .   | 5  |
| Success Live CE<br>Instructor-Led CE for Executive and Wholesaling Teams . . . . .  | 6  |
| Success Live Track - Administration and Tracking of Live CE . . . . .   | 7  |
| Custom CE Credit Cards & Vouchers . . . . .   | 8  |
| Affiliate Websites Co-Branded Design for Your Company . . . . .   | 9  |
| Superior CE<br>Showcasing your Products to Large Audiences . . . . .  | 10 |
| Online Pre-Licensing for Insurance and Securities . . . . .   | 11 |
| Proprietary Course Creation . . . . .   | 12 |
| Administration & Record Retention CE Program Services . . . . .   | 13 |




# About The Success Family Of CE Companies

The Success Family of CE Companies is your “One-Stop” shop for all Continuing Education and Pre-Licensing needs


1. Nationwide Insurance, CFP, Professional Recertification Program (PRP), CIMA, and CPA Continuing Education - Life/Health, Property/Casualty, and Claims Adjuster Courses. All state-specific and required courses available.
2. Online, Classroom Equivalent, Textbook, and Classroom course options
3. Customized (for your company) CE websites and optional Product-Specific Training / Verification
4. Custom content and course creation highlighting your product benefits
5. Insurance & Securities Pre-Licensing: Available in All States
6. Online Compliance and Administrative Tracking/Verification Services for All of the Above product lines

We offer courses in Live CE (classroom), Online, and Textbook formats - Approved Nationwide


Here is a list of the continuing education company providers under the Success CE umbrella and their specialties:

 **Success CE** - specializing in online CE courses and administrative tracking services. One of the pioneering CE providers in the area of online courses, Success CE is the "pace-setter" for the rest of the CE industry. The Success Management System (SMS) for compliance & administration tracking is included at no additional charge for our corporate clients.


[www.SuccessCE.com](http://www.SuccessCE.com)

 **Success Live CE** - specializing in providing pre-approved "Live Presentation" (instructor-led classroom) courses for executives and wholesalers, to increase attendance at meetings and conferences. Live Track at no additional charge for corporate compliance & administration.

[www.SuccessLiveCE.com](http://www.SuccessLiveCE.com)

 **Affordable CE** - providing a wide range of "textbook" self-study continuing education and online continuing education for Insurance, CFP, Professional Recertification Program (PRP), and CIMA.

[www.AffordableCE.com](http://www.AffordableCE.com)

 **Affordable-Success-FirstChoice-ClientTell** - is the Insurance Provider for all states and CE designations.

\*ClientTell CE - is the New York state Insurance Provider

## Our Mission

To earn the loyalty and trust of individual clients, companies, and employees by providing superior products and unmatched customer service. We are committed to providing your team of professionals with the best systems, processes, and resources available.

# Products & Services

## The Success Family of CE Companies

As a premier provider in continuing education and pre-licensing training, the Success Family of CE Companies offers over 350 nationwide-approved courses in Insurance (Life/Health & Property/Casualty), Claims Adjusters, CFP, CIMA, CPA, and Professional Recertification Program (PRP); as well as pre-licensing in Insurance and Securities training.

Our courses are uniquely designed with dynamic content that will not only help you meet your state's pre-licensing and continuing education requirements, but our courses will leave you with a true "value added" that is proven to separate you from your competition!



### PRODUCTS

#### Online Continuing Education

Over 350 nationwide-approved online continuing education courses for Insurance (Life/Health and Property/Casualty), Claims Adjuster, CFP, CIMA, and Professional Recertification Program (PRP)

#### Success Live CE (Instructor-Led)

Instructor-led presentations for Insurance, CFP, CIMA, CPA, and Professional Recertification Program (PRP). Be the first expert by presenting Live CE to your producers!

#### Customer CE Credit Cards & Vouchers

Offer company-branded complimentary continuing education to increase sales and the quality of "face time" for your wholesalers

#### Affiliate Websites

Build your business brand and gain more producers

#### Online Pre-Licensing Education

Interactive pre-licensing courses available for Insurance (Life/Health & Property/Casualty) and Securities (Series 6, 7, 24, 26, 63, 65, 66). Pass the first time!



### SERVICES

#### Success Management System (SMS)

Track all agents and/or advisors' progress with CE completions and product-specific training on your own co-branded website. Alert licensees with CE renewal notices to stay in compliance!

#### Annuity Suitability & Product Training

Track and verify all of your agents' state Annuity requirement and Product-Specific Training completion status

#### Success Live Track

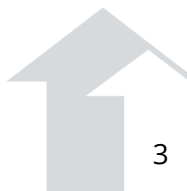
Compliance solutions plus complete administration and tracking of Live CE presentations with Success Live Track

#### Superior CE

Increase your sales results at meetings and conferences by offering a Live CE presentation, sequenced with Self-Study CE credit after your product presentation

#### Proprietary Course Creation

Highlight your specific products, features, and benefits. Position your wholesalers as the experts on topics important to you!



# Quality Online Life/Health, Property/Casualty Insurance, Claims Adjuster, CFP, CPA, CIMA and Professional Recertification Program CE

Save Time and Money - The Success Family of CE Companies offers over 350 nationwide-approved continuing education courses in the following:

- Insurance (Life/Health & Property/Casualty)
- Claims Adjuster
- Certified Financial Planner (CFP)
- CPA
- CIMA
- Professional Recertification Program (PRP)

We offer all required state-specific courses in every state such as Ethics, Annuity Training, Long-Term Care, Claims Adjuster, Flood, and NAIC Annuity Suitability.



## Complete All your CE with our “Unlimited Success Package”

365 DAYS | UNLIMITED CE COURSES | *only* **\$35.95 OR LESS\***

(Corporate Volume Discounts Available)

Earn Free CE  
with our  
Rewards Program

Se Habla  
Español

One & Done  
Insurance CE

Lowest Price  
Guaranteed

Twice Daily  
Reporting of  
CE Credits

Unlimited  
Final Exam  
Retakes

Fastest & Easiest  
CE Course  
Completion

Mobile  
Friendly

Additional  
**CE**  
Available

### with PRP:

- CLU/ChFC
- RHU
- REBC
- CASL
- CLF
- CAP
- FSCP
- ChHC
- ChSNC

### with CFP:

- AAMS
- ADPA
- APMA
- AWMA
- CMFC
- CRPC
- CRPS
- MPAS
- RP

*“You make it super easy,  
super inexpensive...  
You’re the one-stop shop  
for continuing education.”*

- Carmen D. | Santa Barbara, CA

*“The only company  
we use for the ease,  
convenience and  
professionalism.”*

- Chris M. | Stanford, CT

*“All the state-required Ethics, Annuity Training,  
and Long-Term Care in one website. Outstanding.”*

- Jonathan B. | Dublin, OH

# Success Management System (SMS)

## Administration and Tracking of Online CE



Easily track all of your Insurance Agents and/or Financial Advisors with Life/Health & Property/Casualty, CFP, and other licenses to ensure renewals



Alert licensees of their upcoming CE requirements for license renewal to ensure every licensee is in compliance with their resident state



Track & Verify all of your Agents state Annuity requirement and Product-Specific Training completion status



**We offer every state-specific required CE course your agents need to stay in compliance for license renewal!**

### Track Your Producers' Progress with Your own Co-Branded Website!

*Customized features include:*

- **Individual CE Course Progress & Completions**
  - Track individual course completions for each Producer
- **Branch/Territory Progress & Completions**
  - Track progress in a particular geographical area or region
- **Total CE Completion Tracking**
  - Track the overall completion of your reps to ensure all have met their renewal requirements

- NAIC Annuity Suitability
- Training Long-Term Care
- Ethics
- Flood
- Claims Adjuster
- Laws and Regulations

*"The Success Management System is technologically superior to any administration and tracking product I have seen. It is much easier to use. SMS allows my staff to keep our licensees in compliance" - Theresa K. | V.P. Licensing*

**The Success Family of CE Companies is nationwide-approved for Insurance, CFP, CIMA, CPA, and Professional Recertification Program (PRP)**

**We offer over 350 courses including all state-specific required CE courses!**

# Success Live CE

## Instructor-Led CE for Executive and Wholesaling Teams to Recruit & Retain Producers

- Success Live CE is known throughout the Insurance & Brokerage industry for its innovative and unique Live CE presentations
- The popularity of these programs inspired us to create a series of courses that offer continuing education & technical product knowledge for investment/insurance professionals
- Life/Health, Property/Casualty, CFP, CPA, CIMA, or Professional Recertification Program (PRP) CE Credits available for License Renewal
- Our programs are finely tuned to benefit the Insurance & Brokerage industry with recruiting and retention:
  - Designed for Executives & Wholesaler presentations at Meetings and Conferences!



**Insurance, CFP, CPA, CIMA, and  
Professional Recertification Program  
Credits are Available**

### TURNKEY CONTINUING EDUCATION PROGRAMS

#### *Key Benefits:*

- 📌 Over 30 pre-approved Live CE presentations for your executives and wholesaling teams
- 📌 Quickly obtain Course and Instructor approvals for you and your wholesaler team
- 📌 Custom course creation specific to your product(s) available
- 📌 Be recognized as an industry expert by presenting Live CE
- 📌 Gain the trust and respect of your top producers & recruits with quality face-time
- 📌 Live Track allows easy scheduling, approvals, attendee data, and more!
  - Exclusive with Success Live CE

**This concept gives the Sponsoring Firm the ability to Double Attendance**

*"As a wholesaler, I wanted you to know that I am grateful to our executives for making the change to Success Live CE. Here is the e-mail that I sent today to the home office: 'Online scheduling of Live CE meetings is so much easier with our new firm, Success Live CE, and their online system for managing my presentations is far superior to what we were using. Thanks for giving us in the field a better product.'" - Jason F. | Annuity Wholesaler, New York*

**Double Your Attendance with Live CE,  
Keep the Same Closing Ratio, and Double Your Sales!**

# Success Live Track

## Administration and Tracking of Live CE

### CE ADMINISTRATION BECOMES EASY!

- Save time and money on CE administration with Success Live CE
- Customized website for tracking and administration
- Achieve more sales with a higher renewal rate and less lapses for all of your licensees
- Easy and Intuitive to Use

### Success Live Track features:

A customized website for your company complete with all of our latest Administration Tools!

#### PAST CE PRESENTATIONS

1. View attendance from previous Live CE (classroom) presentations
2. Avoid repeating classes with the same audience
3. Run reports at the touch of a button

#### CURRENT PROGRAM STATUS

1. View all instructor, course and provider approvals
2. View and download all PowerPoints and class handouts
3. Schedule classes online 24/7/365

#### UPCOMING CE PRESENTATIONS

1. View company scheduled classes chronologically
2. Notification of state approval for your scheduled class
3. Organize and view company classes with your own customized calendar

**Royal Midwest Life Insurance Company**  
Success Live Track - Scheduled Courses

| Course Date | Course                                    | Instructor    | Location      |
|-------------|---|---------------|---------------|
| 12/02/18    | Retirement Income Solutions               | Joe Smith     | Olathe, KS    |
| 12/07/18    | Ethics in Insurance & Consumer Protection | Jessica Carey | St. Louis, MO |
| 12/07/18    | Retirement Income Solutions               | Jessica Carey | St. Louis, MO |
| 12/09/18    | Ethics in Insurance & Consumer Protection | Steve Lott    | Portland, OR  |
| 12/10/18    | Retirement Income Solutions               | Steve Lott    | Portland, OR  |

**Royal Midwest Life Insurance Company**  
Success Live Track - Calendar

December 2018

| Sunday | Monday   | Tuesday   | Wednesday   | Thursday  | Friday | Saturday |
|--------|--|---|---|---|--------|----------|
| 29     | 30   | December 1  | 2   | 3   | 4      | 5        |
|        |  |   | Approved<br>Joe Smith for "Retirement Income Solutions"                 |   |        |          |
| 6      | 7  | 8   | 9   | 10  | 11     | 12       |
|        | Approved<br>Jessica Carey for "Ethics in Insurance & Consumer Protections" | Approved<br>Jessica Carey for "Retirement Income Solutions" | Approved<br>Steve Lott for "Ethics in Insurance & Consumer Protections" | Approved<br>Joe Smith for "Retirement Income Solutions" |        |          |
| 13     | 14   | 15  | 16  | 17  | 18     | 19       |

*"Success Live CE and their Live Track is the best administration tool in the industry. At the touch of the keyboard, we are able to view our wholesalers' CE classes, check a roster for our producers, and perform any function we desire. We have used other company's products and, quite frankly, they don't compare with the robust abilities of Success Live CE and their Live Track program."*

- Robert R. | Executive V.P. - Sales, National Product

# Custom CE Credit Cards and Vouchers

As we approach a new era of financial products and services, it is crucial for your Company, Executives, and Wholesalers to be unique. Increase your firm's sales and prestige!

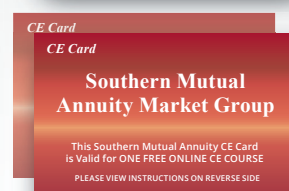
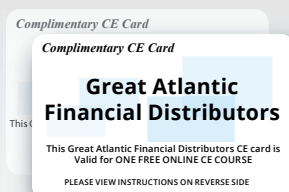
Offering CE Credit Cards & CE Vouchers will separate YOU from your Competition!

## Success Continuing Education CE Credit Cards & Vouchers



CE Vouchers - Minimum order of 10 vouchers

*"The Universal truth is that ALL of your Producers need CE"*



CE Credit Cards - Minimum order of 500 cards

*"The Success CE Insurance Continuing Education Vouchers doubled my advisor and agent attendance at a conference presentation. I'll be ordering more!" - Alan S. | Wholesaler*

## One FREE Online Course

*Up to 24 Insurance CE Hours*

*(depending on state)*

### Includes ...

- Course Grading • Certification
- Reporting CE credits to State DOI and Designations

### BRAND YOUR BUSINESS

*Offer Continuing Education at  
Conferences, Meetings, and  
Wholesaler Presentations*

### Looking to ...

- Increase Sales & the Quality of "Face Time" for Your Wholesalers
- Double the Attendance at your Meetings & Presentations
- Be recognized as an industry expert by providing knowledge to your Producers, IMO, or B/D clients

### Customize with ...

- Your Company Name • Your Color Scheme
- Your Company Logo • No Expiration Date

For inquiries or orders,  
please contact us  
at (949) 706-9453

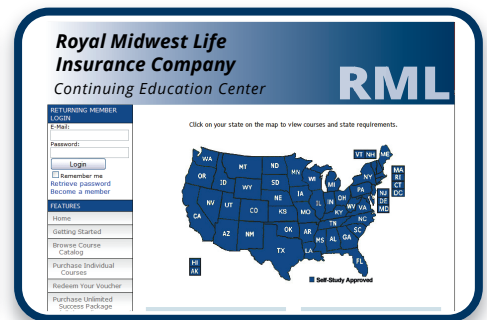
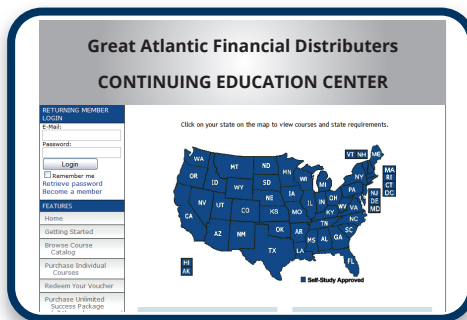
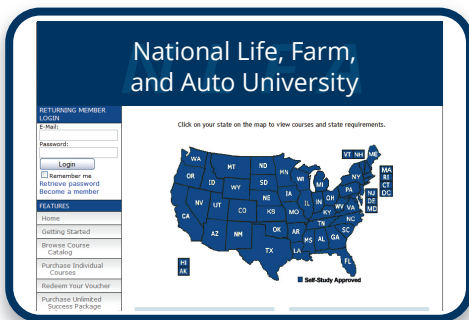
# Affiliate Websites

## Co-Branded Design for Your Company

Customized affiliate website for your Producers to complete their Continuing Education to renew their License



- **Retain more Producers & Increase Sales - Direct them to your website to complete their required Insurance CE, CFP, CIMA, AML, Annuity Suitability, or Professional Recertification Program (PRP) requirements at a reduced cost**
- **Simplify your Compliance by verifying CE requirements for your producers with your customized Administration Panel**
- **Access Product-Specific Training and verify CE course completions with your co-branded website**



**Co-Branded Insurance Education Platform tailored to your Company's Look and Feel!**

*"As a part of our efforts to grow our business, we began using the co-branded affiliate site from Success CE in order that all of our licensees could access the CE from our Home Page to save time and money renewing their license. Agent retention and sales are higher since implementation. This is a great idea to keep our producers coming to our website!" - Russell T., Senior V.P. | National Life and Auto Company*

# Superior CE

## Showcasing Your Products to Large Audiences

- ↑ With Superior CE, your producers and recruits, complete a large number of CE hours AND learn about your product!
- ↑ Combine a ONE hour LIVE CE presentation, sequenced with up to 24 hours of Self-Study for your product presentation!
- ↑ Includes all fees for the One Hour Live CE, plus self-study material delivery 21 days prior to meeting, exams, grading, certification and reporting!
- ↑ Pre-Register online or send us your attendance list!

*\*Chapter review questions & significant pre-study required*



Please Contact Us to learn more  
about Superior CE sessions!

(949) 706-9453

Info@SuccessCE.com

### Sample Agenda at a Glance:

- Welcome and One Hour Classroom Course
- *Break*
- Your Company's Product Presentation
- *Break*
- Self-Study Material

*\*You may vary the agenda*

*"The Superior CE program had an 80% increase in attendance over just 1 hour CE at Lunch. Success CE's PowerPoints and Speaker Notes are much easier to present and their online technology allows for easy attendee scheduling, certificate issuance, and for "look back" purposes to create more sales. As an executive presenting 50 CE presentations per year, I am glad we went with Success CE." - Patrick L. | CCO*

# Online Pre-Licensing for Insurance and Securities

## Are Your Recruits Passing their Exams the First Time?

The Success Family of CE Companies, combining multiple solutions is the preferred choice for online Pre-Licensing training for Insurance and Securities. Try our Mobile Learning Platform equipped with Interactive Media Content. Pass the first time you take the Exam!

We offer the following Pre-Licensing courses in All 50 states:

### Securities

Series 6  
Series 7  
Series 24  
Series 26  
Series 63  
Series 65  
Series 66

### Insurance - (Life/Health & Property/Casualty)

- HD Video Instructions
- Exam Focused Content
- Simulated Final Exams for every state
- Interactive Media Content
- Printable Chapter Summaries
- Student Mentoring

**Individual & Corporate Discounts Available**

*Call (949) 706-9453 for your Discount Code*

**\*Chapter Practice and Simulated Exams are included with all courses at no extra charge!**



*"I just wanted to let you know that i PASSED my Insurance exam the first time I tried!! I couldn't have done it without the help of your course. Thank you very much, it was extremely helpful to me in passing!!"*  
- Debbie S. | California (Insurance)

*"Your practice exams actually mirror what I saw on the actual exam. I passed the first time with my Series 26. A great product!"* - Anthony B. | Florida (Series 26)



# Proprietary Course Creation



**CONTACT US AND  
GET YOUR COMPANY  
STARTED TODAY!**

**Call us at (949) 706-9453**

- ↑ With Custom Course Creation (CCC); your company can highlight your specific products, features, and benefits
- ↑ Position your wholesalers as the expert on topics important to you
- ↑ Multi-discipline approvals for Insurance, CFP, CIMA, CPA, and Professional Recertification Program (PRP)
- ↑ Hot-topic courses can be presented by your executives and wholesalers
- ↑ Turnkey course production and approval process
- ↑ Excellent training support for your course instructors
- ↑ Customized invitations available
- ↑ Can be coordinated with our custom CE cards and/or CE voucher program for hard-to-find state-specific courses
- ↑ Double the attendance at your wholesaler meetings
- ↑ Your company will be unique and be remembered

# Administration & Record Retention CE Program Service

The Success Family of CE Companies provides administrative and record-keeping services for continuing education programs. Our company offers personalized service, numerous online tools and reports for tracking your CE program and the ability to customize a program to fit your exact needs.

You will save time and money by using Success CE for a portion, or all, of the administration of your CE programs.

Any of the following options can be utilized individually for specific purposes or combined in a comprehensive online or Live CE program:

- **CONTINUING EDUCATION COURSE APPROVAL FILINGS**
- **ONLINE ACCESS TO PROGRAM MANAGEMENT TOOLS**
- **CE INSTRUCTOR APPROVAL FILINGS**
- **ROSTERS COMPLETED AND SENT TO STATES**
- **INSTRUCTOR COURSE MATERIALS**
- **STATE NOTIFICATION OF CE PRESENTATIONS**
- **CERTIFICATES OF COURSE COMPLETION**
- **DETAILED REPORTING OF SCHEDULES AND ATTENDANCE**
- **RECORD KEEPING & RETENTION**  
(COPIES OF ATTENDANCE SHEETS, COURSE OFFERINGS, ETC.)

*Build Your Own  
Administration & Record  
Retention Program  
with Any Service(s)  
Listed Above!*

The online Success Management System (SMS) and Success Live Track are included at no additional charge for corporate clients of The Success Family of CE Companies

# The Success Family of CE Companies

Success CE • Success Live CE • Affordable CE

Your **One Source** for  
Continuing Education and Pre-Licensing  
Solutions for Your Company

## **West Coast Office**

2 Corporate Plaza Drive, Suite 100  
Newport Beach, California 92660  
Phone: (949) 706-9453  
Kate@SuccessCE.com

## **East Coast Office**

Atlanta, Georgia  
Matt Figueroa  
Phone: (770) 783-1162  
MFiguerroa@SuccessCE.com