

# Balancing Growth and Protection

Continuing Education Program

Provided by Success Continuing Education

|            |   |
|------------|---|
| Date:      | October 11, 2024  |
| Time:      | 9:00 a.m. – 11:30 a.m. EST  |
| Location:  | <b>Tundra Lodge Resort</b><br>865 Lombardi Ave<br>Green Bay, WI 54304 |
| Presenter: | Michael Raymond   |
| Hosts:     | Ben Chera   |

## Agenda

9:00 a.m. – 9:30 a.m. Welcome & Lincoln Updates

9:30 a.m. – 10:30 a.m. Non-CE Seminar: Balancing Growth and Protection

**10:30 p.m. – 11:30 AM Exam for CE**

**Credit: Agents & Advisors Key to Annuities & Ethical Conduct**

Registration and attendance are mandatory to receive credit.

Please register on or before **October 9, 2024**.

Once registration is complete, you will be redirected to REVIEW your STUDY MATERIAL.

**CLICK THE LINK TO REGISTER**



**PLEASE DO NOT COPY AND PASTE THE LINK ABOVE. THE LINK WILL BE DISABLED AND REGISTRATION CANNOT BE COMPLETED.**

| License         | Self-Study credit        |
|-----------------|--------------------------|
| State CE Credit | See Next Page            |
| CFP             | 10                       |
| CIMA            | 12 (1 Ethics, 2 Tax Reg) |
| CLU/ChFC        | 24                       |

- To receive credit, you are required to take an exam and receive a passing score of 70% or higher.
- Credit hours are subject to change.
- Success CE reports your credits directly to the state Department of Insurance and regulatory authorities.
- **The Continuing Education portion of this seminar is provided by approved Provider: Affordable-Success-FirstChoice-Clientell, CFP Provider #124, CIMA Provider #115643, CLU/ChFC #N/A.**
- For questions regarding the CE portion of this program, please call 949-706-9453 and indicate your inquiry is pertaining to our Superior CE program

### IMPORTANT ANNOUNCEMENTS:

- You must receive and review the correspondence/self-study material prior to attending the CE program. The materials are available after registration is complete.

**Agents and Advisors, Key to Annuities & Ethical Conduct:** Provider and Credit Amounts per State

| State | Provider#   | Course Number  | Self-Study Credits    |
|-------|-------------|----------------|-----------------------|
| AL    | 200343      | 6000067104     | 24 (18 Gen, 6 Ethics) |
| AK    | 1011        | 6000067617     | 24 (18 Gen, 6 Ethics) |
| AZ    | S10544      | 106252         | 24 (18 Gen, 6 Ethics) |
| AR    | 11118       | 6000067004     | 24 (18 Gen, 6 Ethics) |
| CA    | 147383      | 384181         | 24 (18 Gen, 6 Ethics) |
| CO    | 49837       | 61718          | 24 (18 Gen, 6 Ethics) |
| CT    | 10544       | 114891         | 24 (18 Gen, 6 Ethics) |
| DE    | 419         | 6000066935     | 24 (18 Gen, 6 Ethics) |
| DC    | 1139        | 6000066928     | 24 (18 Gen, 6 Ethics) |
| FL    | 1015        | 113212         | 19                    |
| GA    | 11093       | 59171          | 24 (18 Gen, 6 Ethics) |
| HI    | 207707      | 110531         | 24 (18 Gen, 6 Ethics) |
| IL    | 101648      | 6000067770     | 12                    |
| IN    | 82915       | 37879          | 24 (20 Gen, 4 Ethics) |
| IA    | 10544       | 105465         | 24 (18 Gen, 6 Ethics) |
| KS    | 97          | 6000067214     | 24 (18 Gen, 6 Ethics) |
| KY    | S10544      | C23666         | 24 (18 Gen, 6 Ethics) |
| LA    | 9616        | 33581          | 24 (18 Gen, 6 Ethics) |
| ME    | 437         | Provided After | 24 (18 Gen, 6 Ethics) |
| MD    | 207690      | 106867         | 24 (21 Gen, 3 Ethics) |
| MA    | S10544      | 23666          | 24 (18 Gen, 6 Ethics) |
| MI    | 585         | 85631          | 24 (Ethics)           |
| MN    | 9145        | 1029688        | 18                    |
| MS    | 10000397    | 20923          | 24 (18 Gen, 6 Ethics) |
| MO    | 1240921     | 17004776       | 24 (18 Gen, 6 Ethics) |
| MT    | 72          | Provided After | 24 (18 Gen, 6 Ethics) |
| NE    | SP294174    | 6000067832     | 24 (18 Gen, 6 Ethics) |
| NV    | 108987      | 23916          | 24 (18 Gen, 6 Ethics) |
| NH    | 1075        | 6000068167     | 24 (18 Gen, 6 Ethics) |
| NJ    | 23100       | 88902616       | 24 (18 Gen, 6 Ethics) |
| NM    | 3456        | 6000067499     | 24 (18 Gen, 6 Ethics) |
| NY    | NYPO-100085 | Provided After | 15                    |
| NC    | S10544      | 212390         | 24 (18 Gen, 6 Ethics) |
| ND    | 1327        | 6000066999     | 24 (18 L/A, 6 Ethics) |
| OH    | 1324        | 66980 & 66981  | 24 (18 Gen, 6 Ethics) |
| OK    | 286         | 6000067772     | 20 (14 Gen, 6 Ethics) |
| OR    | 09934       | 6000067288     | 24 (18 L/H, 6 Ethics) |
| PA    | 37727       | 131326         | 24 Gen                |
| RI    | 648         | 6000067964     | 24 (18 Gen, 6 Ethics) |
| SC    | S10544      | 6000067293     | 24 (18 Gen, 6 Ethics) |
| SD    | 504         | 1280490        | 10                    |
| TN    | 1088        | 32755          | 24 (18 Gen, 6 Ethics) |
| TX    | 32942       | 123446         | 12 (10 Gen, 2 Ethics) |
| UT    | 11579       | 39320          | 12                    |
| VT    | 107406      | 30061          | 24 (18 Gen, 6 Ethics) |
| VA    | 123947      | 221104         | 24 (18 Gen, 6 Ethics) |
| WA    | 37752       | 625535         | 24 (21 Gen, 3 Ethics) |
| WV    | S10544      | 107542         | 24 (18 Gen, 6 Ethics) |
| WI    | 20756       | 6000069203     | 24 (18 Gen, 6 Ethics) |
| WY    | 15008546    | 31453          | 24 (18 Gen, 6 Ethics) |
| CFP   | 124         |                | 10                    |
| CIMA  | 115643      |                | 12 (1 Ethics & 2 TR)  |

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|---|
| Not a deposit                                     |
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| Not guaranteed by any bank or savings association |
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