



Career Enhancement Program
Registration Packet



Brokers International.[®] Ltd.

800.362.1097 | www.BILTD.com



Please read the following information carefully.

Enclosed is your pre-qualification form. Please choose your desired CEP date and complete the form. Please fax your completed pre-qualification form to 641-755-4201.

If you qualify to attend, you'll be contacted by a Brokers International, Ltd. associate to confirm your registration. At that time you'll also receive a travel form and will be asked to submit your travel and lodging arrangements.

Please note that you are responsible for your transportation costs to Iowa. We'll arrange for an airport shuttle for those flying into Des Moines International Airport. And, we'll cover your hotel accommodations for two nights, including room & tax.

During your stay, we'll provide the following meals:

Wednesday - Supper

Thursday - Breakfast, Lunch, and Supper

Friday - Breakfast and Lunch

Please let us know if you have any special dietary requirements.

It is important that you do not make travel arrangements until you are contacted by a Brokers International, Ltd. associate.

On Monday prior to the meeting, you'll receive a travel packet via email. This packet will contain the information needed for your trip; airport pick-up schedule, hotel information, and driving directions.

There will be software education Thursday at the meeting. We'll email a link to download to your laptop, if you have one, prior to your departure. Please bring your laptop to the meeting so you can follow along during the training.

If you have any questions, please call Connie Gustin or Maria Tetrev at 800.362.1097.



2010 Program Dates

January 13-15

February 10-12

March 17-19

April 14-16

May 12-14

June 9-11

July 14-16

August 11-13

September 15-17

October 13-15

November 10-12

December 8-10



Agenda Overview

Day 1 - Wednesday

Life Marketing Workshop

- Annuity Maximization
- Max Funding of Life Insurance

Annuity Training

- Allianz
- American Equity Life Insurance Company
- Aviva
- Great American
- Fixed Indexed Annuities

Day 2 - Thursday

Introduction to Brokers International, Ltd.

Road to Success

CPA Alliance Program

OnTrak™

Agent Portal

Brokers International Financial Services, LLC

The American Trust Referral Program

WOMAN™

Panel Discussion

Income Riders

Day 3 - Friday

Contracting with Personal Marketers

Combo Annuity & Life Products

Compliance Update

Understanding the Tax Return

*Please note that the daily agendas and presentations may change due to scheduling adjustments.

****Please note that no audio recording, video recording or photography is allowed at any time.**

Career Enhancement Program Agent PreQualification Form

What date do you plan on attending? _____, 2010

Name: _____

Phone: _____

Company Name: _____

Fax: _____

Business Address: _____

Cell: _____

E-Mail: _____

Gender: Male Female Date of Birth: ___/___/___

If you are insurance licensed, please complete the following section. If you are a CPA who does not have an insurance license, please leave the following section blank.

What is your primary reason for attending CEP? OnTrak™ CPA Program American Trust Other - please specify _____

How long have you been in the insurance business? 0-5 years 5-10 years 10+ years

Do you have any agents reporting to you? Yes No If Yes, approximately how many? _____

Are you currently licensed in your resident state? Yes No License Number _____

Do you hold any non-resident licenses? Yes No If Yes, for which states? _____

Specify all companies you are contracted with & list who holds your contract for the following carriers.

- | | | |
|---|--|--|
| <input type="checkbox"/> Allianz _____ | <input type="checkbox"/> Great American _____ | <input type="checkbox"/> Mutual of Omaha _____ |
| <input type="checkbox"/> American Equity _____ | <input type="checkbox"/> ING _____ | <input type="checkbox"/> SunLife _____ |
| <input type="checkbox"/> An Aviva Company _____ | <input type="checkbox"/> Liberty Bankers _____ | <input type="checkbox"/> Transamerica _____ |
| <input type="checkbox"/> Equitrust _____ | <input type="checkbox"/> Lincoln Financial Group _____ | <input type="checkbox"/> National Western Life _____ |
| <input type="checkbox"/> Old Mutual _____ | <input type="checkbox"/> Midland _____ | <input type="checkbox"/> Other _____ |

In the last 12 months, what was your approximate income from your insurance business?

Under \$50K \$50K - 100K \$100K - 150K \$150K +

Total Fixed Annuity Premium

\$0-\$199K \$200K-\$499K \$500K-\$999K \$1M - \$1.9M \$2M - \$4.9M \$5M + Not In Business

Type(s) of Annuity Fixed Immediate Indexed Variable

Total LTC Premium

\$0-\$999 \$1,000-\$2,999 \$3,000 - \$4,999 \$5,000 - \$6,999 \$7,000 - \$9,999 \$10K +

Other LTC GE John Hancock Mutual of Omaha Penn Treaty Assurity Allianz

Total Life Premium

\$0-\$19K \$20K-\$49K \$50K-\$99K \$100K - \$149K \$150K - \$249K \$250K + Not In Business

Type(s) of Life Equity Index Term Universal Life Variable Whole Life 2nd to Die

Security Commission

\$0-\$9K \$10K-\$24K \$25K-\$49K \$50K - \$74K \$75K - \$99K \$100K + Not In Business

Security Licenses 4 6 7 22 24 26 63 65 66 RIA IAR None

Broker Dealer Name: _____

How does your current Broker/Dealer treat your Indexed Annuity Production?

Supervised only Supervised with commission haircut Not allowed to sell Treated as an outside business activity

Are you interested in speaking to somebody from Brokers International Financial Services, LLC regarding the Broker/Dealer or the Registered Investment Advisor? Yes No

What is your primary Client Market(s) Check all that apply

Estate Planner Sr. Market Younger Market PC, HlthDI, MedSup Financial Planner Retirement Planning Tax Planner

What Marketing Resources do you use? Check all that apply

Direct Mail Newspaper Seminars Tax Preparation Web Site Cust. Referrals Mail/Fax/E-mail blast Professional Relationships

Please fax this back along with a copy of your insurance license,
E & O dec page and a copy of a voided check to 641.755.4201

www.BILTD.com 800.362.1097
For agent information only.