Delaware Life

Delaware Life Income Planning Institute℠

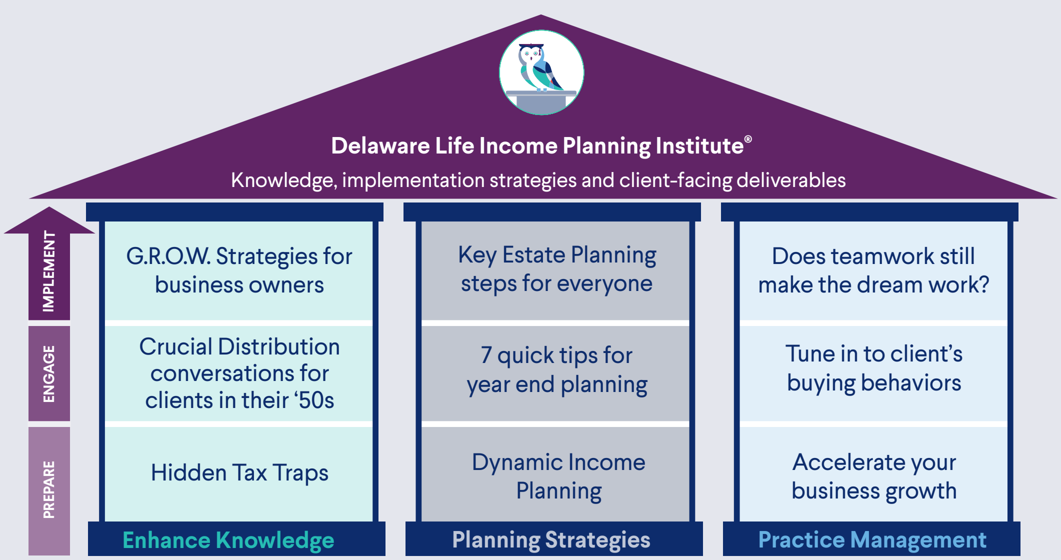
Advisor training workshops from the Delaware Life Income Planning Institute

Below are advisor training workshop topics offered by the Delaware Life National Sales Consulting Team.

These workshops can be tailored to create a customized training experiences to address specific interests and/or training needs and can be delivered by the Delaware Life NSC directors as 10-minute webinars, 50-minute workshops, or half-day or longer training meetings.

- Hidden tax traps*
- Key estate planning strategies for everyone*
- Crucial distribution conversations with clients in their 50s*
- The tax journey: Accumulation to wealth transfer*
- 7 quick tips for year-end planning
- G.R.O.W. strategies for business owners
- RMDs: What to do with ’em?
- Dynamic income planning
- Does teamwork still make the dream work?
- Tune in to client buying behaviors
- Accelerate your business growth
- Bank referral training

*Topics with an asterisk have been approved for continuing education as well. Please see page 2.



Continuing education offerings

For advisors who need to meet their continuing education requirements, we also offer several timely topics in both the traditional one-hour CE format or as a review for Super CE exams:

One-hour CE classroom or webinars

- Traditional one-hour continuing courses that can be delivered in person or virtually.
- Attendees must sign in and out of the workshop and remain in the room for the full 50-minute duration of the course.
- Topics:
  - Hidden tax traps
  - The tax journey: Accumulation to wealth transfer
  - Crucial distribution conversations with clients in their 50s
  - Estate planning for mass-affluent clients

Super CE exam review topics:

- Delaware Life presents a review course on the topic. This review course is NOT a CE course.
- These review courses prepare attendees to take an online exam which, when passed, is approved for 10–21 hours of state insurance continuing education, depending on the topic and the state, as well as approval for many industry designations.
- Upon completion of the review course, attendees will have one week to access the online exam, which they must pass with a score of at least 70% to earn the CE. Advisors may retake the exam as many times as necessary within the seven-day period to pass.
- Please confirm state-specific approvals with your Delaware Life Regional Vice President (RVP) or relationship manager.
- Topics:
  - Strategic retirement planning
  - Social Security & retirement benefits
  - Understanding IRAs
  - Ethical standards for producers (3 hours in most states)

About National Sales Consulting (NSC)

The directors on the Delaware Life NSC Team provide advanced sales and planning expertise on a variety of income, tax, estate, and financial planning topics, along with actionable ideas and resources for effective client engagement. They also consult on business development topics including sales training, team building, and leadership development.

The team averages over 30 years of industry experience, their workshops offer valuable education, and their practice management strategies help simplify complex planning issues for clients. The team's objective is to help financial professionals be successful and create a competitive advantage.

About Delaware Life

We've made it our mission to deliver value and results to everyone we work with by:

- Building our client-focused products with straightforward features, appealing indexes, and reasonable fees—plain and simple.
- Making products available to knowledgeable financial representatives who deliver those products with clarity and integrity to help clients make smart decisions to protect their savings and build for the future.
- Creating a seamless, accurate service experience you can rely on from the first moment you contact us.

For more information on these strategies, please contact the Delaware Life National Sales Consulting Team at:

- **844.DEL.SALE (844.335.7253)**
- **SalesSupport@DLMarketing.com**

Visit the Delaware Life Income Planning Institute℠ website at advisors.delawarelife.com. (First-time visitors will be asked to register.)

delawarelife.com