

PROFESSIONAL LICENSURE

INSURANCE PRE-LICENSING

Property and Casualty Insurance: New York State License Preparation Course

INS 35/\$795

The Insurance Agent and Broker's Course is for individuals preparing to qualify for the New York State insurance license examination.

This course, approved by the New York State Insurance Department, meets the education requirements for the New York State examination for licensing as an agent (#115 Insurance Law) and as a broker (#119 Insurance Law).

NOTE: Students are required to attend 100 percent of instructional sessions.

Highlights of the program include: general principles; fire insurance; automobile insurance; general liability; workers' compensation; burglary; fidelity and surety bonding; the insurance law; marine insurance; miscellaneous casualty policies; and health and accident insurance policies. *Textbooks must be brought to first class.*
9 CEU

LC Mon./Wed., 6:30 p.m.-9:30 p.m. and Sat., 9:00 a.m.-12:00 p.m., Sept. 21-Dec. 14 (no classes Sept. 28, Oct. 12, Nov. 26) (33 sessions)
Sol J. Oberman, CPCU.

Life Insurance and Accident and Health Insurance: New York State License Preparation Courses

These courses are approved by the New York State Insurance Department as fulfilling the pre-licensing educational requirement for taking the N.Y.S. Life Insurance Agent and Accident and Health Insurance Agent licensing examinations.

INS 21/\$190 Life Insurance

LC Sat., 9:00 a.m.-1:00 p.m., Sept. 26-Oct. 31 (6 sessions) Peter Heisler, CFP®, CLU.

INS 22/\$190 Accident and Health Insurance

LC Sat., 9:00 a.m.-1:00 p.m., Nov. 7-Dec. 19 (no class Nov. 28) (6 sessions) Peter Heisler, CFP®, CLU.

CERTIFIED LICENSED EMPLOYEE BENEFITS ASSISTANT (C.L.E.B.A.)

The scope and costs of employee benefits programs have increased. They are now an integral part of the employee compensation program and trained specialists are needed within the human resources department and in other organizations. Skilled employees are also needed in insurance companies, brokerage offices, doctors and hospital offices etc.

The certificate program for the Certified Licensed Employee Benefits Assistant provides training for business/human resources management students, individuals working in the human resources or insurance fields, or individuals looking for a career change. It includes the principles, terminology, design, operations, administration and distribution of employee benefit plans.

To earn a certificate, participants must complete: **Principles and Practices in Insurance and Pension Benefits, the New York State License Preparation courses in Life Insurance and Accident and Health Insurance (and pass or have passed the NYS Licensing exam for Life Insurance and Accident and Health Insurance).** NOTE: Students can complete courses in any order.

Principles and Practices in Insurance and Pension Benefits

EBA 100/\$195

This course covers health, dental, disability, and life insurance plans, pensions and retirement programs, executive compensation, public insurance and pensions under social security, the legal environment. *Articles from Contemporary business media illustrate the principles using real world examples.* 2.5 CEU

LC Wed., 6:30 p.m.-9:30 p.m., Oct. 7-Nov. 28 (no class Oct. 14) (7 sessions) Hal Kalkstein, MBA, MS, instructor Lehman College.

Life Insurance and Accident and Health: New York State License Preparation Courses:

INS 21/\$190 Life Insurance

LC Sat., 9:00 a.m.-1:00 p.m., Sept. 26-Oct. 31 (6 sessions) Peter Heisler, CFP®, CLU.

INS 22/\$190 Accident and Health Insurance

LC Sat., 9:00 a.m.-1:00 p.m., Nov. 7-Dec. 19 (no class Nov. 28) (6 sessions) Peter Heisler, CFP®, CLU.



PROFESSIONAL LICENSURE

FREE CAREER SEMINARS

**Insurance,
Certified Licensed Employee
Benefits Assistant**

**Wednesday, September 9
6:30 p.m.-8:00 p.m.**

**at Lehman College, Carman Hall
1st Floor - room 129**

For more information, call
(718) 960-8512



**Don't
wait in line!
Sign up on-line!
Go to www.lehman.edu/ce
to register and find
class updates!**

IRS ENROLLED AGENT PREPARATION PROGRAM

An Enrolled Agent is a tax professional who has earned the privilege of representing taxpayers before the Internal Revenue Service. Enrolled agents, like attorneys and certified public accountants, are unrestricted as to which taxpayers they can represent, which types of tax matters they can handle and which IRS offices they can practice before.

The program fulfills the educational requirements of the Internal Revenue Service to sit for the Special Enrollment Examination (SEE) which is a three-part examination. Those who pass both the examination and a background check are then designated Enrolled Agents.

Students who do not have an accounting background should enroll in CFM 43: *Fundamentals of Accounting* (see page 4). Classes meet Tuesdays/Thursdays at Lehman College.

IRS Enrolled Agent Preparation Program

ENR 100/\$900

LC Tues./Thurs., 7:00 p.m.-9:35 p.m., Sept. 8-Dec. 22 (no class Nov. 26) (30 sessions) Deo Singh, C.P.A.

Program Topics:

- ◆ Individual Income Taxes
- ◆ Business and Wealth Transfer Taxes
- ◆ Practice and Procedures

Individual Income Taxes

An in-depth analysis of the rules and regulations governing the preparation of individual income taxes. It includes sources of income, allocation of income, adjustments and deductions, credits and alternative minimum tax. (Prerequisite: CFM 43 or equivalent course or experience.) 3.6 CEU

Business and Wealth Transfer Taxes

Rules and regulations concerning the taxation of business entities, i.e., individual proprietorships, partnerships and corporations. The wealth transfer taxes consist of gift, estate and trusts. The course also covers the qualifications and filing requirements of exempt organizations. 3.6 CEU

Practice and Procedures

A complete discussion regarding the representation of a client before the Internal Revenue Service. The latter part of the course will be devoted to a review in preparation for the Enrolled Agent Examination. 3.6 CEU

Notary Public Exam Preparation

NTP 10/\$85

Tuition for this course is to be paid by credit card or money order only.

This workshop helps participants prepare for the New York State Notary Public Exam. Topics include duties and functions, laws, terminology, and ethics. Copies of notary public license laws are provided. *N.Y.S. requires that an applicant be at least 18 years old and a U.S. citizen at the time of appointment.*

LC Sec. 1: Fri., 6:30 p.m.-9:15 p.m., Oct. 16, 23 (2 sessions) Terri S. Blank, Esq., notary public.

CC Sec. 2: Sat., 9:30 a.m.-3:30 p.m. (includes 30 minute break), Nov. 14 (1 session) Terri S. Blank, Esq., notary public.