



Minnesota Insurance and Securities License Planner

July–December 2015

Financial Education



KAPLAN
UNIVERSITY

SCHOOL OF PROFESSIONAL
AND CONTINUING EDUCATION

Obtaining Your Minnesota Insurance License

In order to sell insurance policies in Minnesota, you must be licensed by the Minnesota Department of Commerce. Before applying for your license, you must complete state-approved insurance courses and pass an examination for each line of authority you would like to sell (i.e., Life, Accident & Health, Property, Casualty).

Education Requirements

All new applicants are required to attend 20 hours of education per major line of authority. If you already have one insurance license and are in the process of adding another line of authority, you are required to take an additional 20 hours of education for each new line added.

Insurance Licensing Checklist

Register for an insurance prelicensing course.

Call 877.725.7559 to speak with a Registration Specialist and register for the insurance prelicensing course that corresponds to the license you would like to receive.

Note: Payment is due at the time of registration.

Register for your exam.

Registration with PSI exams is available online and via phone. PSI accepts credit card payments from VISA and MasterCard, and offers exams in the following cities: Duluth, Edina, Lake Elmo, Mankato, Moorhead, Rochester, St. Cloud, Thief River Falls, and Woodbury.

Online

Visit www.psiexams.com and select the “Government/State Licensing Agencies” link to begin registration.

Phone

Call PSI: 800.733.9267. Registrars are available Monday–Friday (6:30 am–7:00 pm) and Saturday (10:00 am–4:00 pm). The Automated Registration System is available 24 hours a day.

Important Notes

- Mandatory education must be completed before taking the exam, but you can register for the exam before completing your courses.
- The exam fee is \$50.
- **School code is 590.**

Complete your mandatory education.

Courses must be completed in their entirety before you will be allowed to take the exam.

Take the exam.

Come to the exam site with:

- Two forms of valid, current signature identification, one of which must be photo-bearing (preferably a driver’s license)
- Original Course Completion Certificate(s)

Cancellations: You may cancel or reschedule up to two days before the testing date without penalty.

Apply for your license.

Go to www.sircon.com/minnesota, select “Apply for a license,” and complete all application information online.

Insurance Licensing Classroom Schedule

Property & Casualty Licenses

Property Licensees are allowed to sell homeowners, commercial property, and inland marine policies, while the **Casualty Licensee** offers policies such as auto insurance, workers’ compensation, crime coverage, and professional liability.

Property & Casualty		
Dates & Locations		
July		
6–10	Mon–Fri	SP
20–24	Mon–Fri	BL
August		
3–7	Mon–Fri	PL
17–21	Mon–Fri	SP
31–Sep 4	Mon–Fri	BL
September		
14–18	Mon–Fri	PL
28–Oct 2	Mon–Fri	SP
October		
12–16	Mon–Fri	BL
26–30	Mon–Fri	PL
November		
9–13	Mon–Fri	SP
30–Dec 4	Mon–Fri	BL
December		
14–18	Mon–Fri	PL

Tuition: \$299
Class Length: 5 days (40 hrs)
Class Times: 8:00 am–5:00 pm

Property Only		
Dates & Locations		
July		
6–8	Mon–Wed	SP
20–22	Mon–Wed	BL
August		
3–5	Mon–Wed	PL
17–19	Mon–Wed	SP
31–Sep 2	Mon–Wed	BL
September		
14–16	Mon–Wed	PL
28–30	Mon–Wed	SP
October		
12–14	Mon–Wed	BL
26–28	Mon–Wed	PL
November		
9–11	Mon–Wed	SP
30–Dec 2	Mon–Wed	BL
December		
14–16	Mon–Wed	PL

Tuition: \$199
Class Length: 2½ days (20 hrs)
Class Times: Mon, Tue: 8:00 am–5:00 pm
Wed: 8:00 am–12:15 pm

Casualty Only		
Dates & Locations		
July		
8–10	Wed–Fri	SP
22–24	Wed–Fri	BL
August		
5–7	Wed–Fri	PL
19–21	Wed–Fri	SP
September		
2–4	Wed–Fri	BL
16–18	Wed–Fri	PL
30–Oct 2	Wed–Fri	SP
October		
14–16	Wed–Fri	BL
28–30	Wed–Fri	PL
November		
11–13	Wed–Fri	SP
December		
2–4	Wed–Fri	BL
16–18	Wed–Fri	PL

Tuition: \$199
Class Length: 2½ days (20 hrs)
Class Times:
• Wed–Fri: 1:00 pm–5:00 pm (Wed)
8:00 am–5:00 pm (Thu, Fri)

Online Licensing Courses for Life, Accident & Health and Property & Casualty Insurance

Kaplan’s interactive online courses offer 10 study tools and **FREE** proctoring, plus the structure and interactivity of an online course with the flexibility of studying nearly anywhere at any time!

\$149 each:

- Life
- Accident & Health
- Property
- Casualty

\$179 each:

- Life, Accident & Health
- Property & Casualty

Life, Accident & Health Licenses

Life Insurance Licensees are authorized to sell life insurance and annuities policies, while Accident & Health Producers are approved to sell medical, disability, Medicare supplements, and long-term care policies.

Life, Accident & Health		
Dates & Locations		
July		
6–10	Mon–Fri	PL
10–12, 17–19*	Fri–Sun	SP
13–17	Mon–Fri	BL
20–24	Mon–Fri	SP
24–26, 31–Aug 2*	Fri–Sun	BL
27–31	Mon–Fri	PL
August		
3–7	Mon–Fri	SP
10–14	Mon–Fri	BL
17–21	Mon–Fri	SP
21–23, 28–30*	Fri–Sun	PL
24–28	Mon–Fri	BL
31–Sep 4	Mon–Fri	SP
September		
8–12	Tue–Sat	BL
11–13, 18–20*	Fri–Sun	BL
14–18	Mon–Fri	SP
21–25	Mon–Fri	PL
28–Oct 2	Mon–Fri	BL
October		
5–9	Mon–Fri	SP
9–11, 16–18*	Fri–Sun	SP
12–16	Mon–Fri	PL
19–23	Mon–Fri	BL
26–30	Mon–Fri	SP
November		
2–6	Mon–Fri	PL
6–8, 13–15*	Fri–Sun	BL
9–13	Mon–Fri	BL
16–20	Mon–Fri	SP
30–Dec 4	Mon–Fri	SP
December		
4–6, 11–13*	Fri–Sun	SP
7–11	Mon–Fri	BL
14–18	Mon–Fri	SP
21–30	Mon–Wed	PL

*Course occurs over two weekends.

Tuition: \$299
Class Length: 5 days (40 hrs)
Class Times:
• Mon–Fri: 8:00 am–5:00 pm
• Tue–Sat: 8:00 am–5:00 pm
• Fri–Sun: (2 weekends)
6:00 pm–10:00 pm (Fri)
8:00 am–5:00 pm (Sat, Sun)

Life Only		
Dates & Locations		
July		
6–8	Mon–Wed	PL
10–12**	Fri–Sun	SP
13–15	Mon–Wed	BL
20–22	Mon–Wed	SP
24–26**	Fri–Sun	BL
27–29	Mon–Wed	PL
August		
3–5	Mon–Wed	SP
7–9**	Fri–Sun	SP
10–12	Mon–Wed	BL
17–19	Mon–Wed	SP
21–23**	Fri–Sun	PL
24–26	Mon–Wed	BL
31–Sep 2	Mon–Wed	SP
September		
8–10	Tue–Thu	BL
11–13**	Fri–Sun	BL
14–16	Mon–Wed	SP
21–23	Mon–Wed	PL
25–27**	Fri–Sun	SP
28–30	Mon–Wed	BL
October		
5–7	Mon–Wed	SP
9–11**	Fri–Sun	SP
12–14	Mon–Wed	PL
19–21	Mon–Wed	BL
23–25**	Fri–Sun	BL
26–28	Mon–Wed	SP
November		
2–4	Mon–Wed	PL
6–8**	Fri–Sun	BL
9–11	Mon–Wed	BL
16–18	Mon–Wed	SP
20–22**	Fri–Sun	PL
30–Dec 2	Mon–Wed	SP
December		
4–6**	Fri–Sun	SP
7–9	Mon–Wed	BL
14–16	Mon–Wed	SP
18–20**	Fri–Sun	BL
21–23	Mon–Wed	PL

**Weekend course.

Tuition: \$199
Class Length:
2½ days (20 hrs)
Class Times:
• Mon–Wed: 8:00 am–5:00 pm (Mon, Tue)
8:00 am–12:15 pm (Wed)
• Tue–Thu: 8:00 am–5:00 pm (Tue, Wed)
8:00 am–12:15 pm (Thu)
• Fri–Sun: (weekend)
6:00 pm–10:00 pm (Fri)
8:00 am–5:00 pm (Sat, Sun)

Accident & Health Only		
Dates & Locations		
July		
8–10	Wed–Fri	PL
15–17	Wed–Fri	BL
17–19**	Fri–Sun	SP
22–24	Wed–Fri	SP
29–31	Wed–Fri	PL
31–Aug 2**	Fri–Sun	BL
August		
5–7	Wed–Fri	SP
12–14	Wed–Fri	BL
19–21	Wed–Fri	SP
26–28	Wed–Fri	BL
28–30**	Fri–Sun	PL
September		
2–4	Wed–Fri	SP
10–12	Thu–Sat	BL
16–18	Wed–Fri	SP
18–20**	Fri–Sun	BL
23–25	Wed–Fri	PL
30–Oct 2	Wed–Fri	BL
October		
7–9	Wed–Fri	SP
14–16	Wed–Fri	PL
16–18**	Fri–Sun	SP
21–23	Wed–Fri	BL
28–30	Wed–Fri	SP
November		
4–6	Wed–Fri	PL
11–13	Wed–Fri	BL
13–15**	Fri–Sun	BL
18–20	Wed–Fri	SP
December		
2–4	Wed–Fri	SP
9–11	Wed–Fri	BL
11–13**	Fri–Sun	SP
16–18	Wed–Fri	SP
28–30	Mon–Wed	PL

**Weekend course.

Tuition: \$199
Class Length:
2½ days (20 hrs)
Class Times:
• Wed–Fri: 1:00 pm–5:00 pm (Wed)
8:00 am–5:00 pm (Thu, Fri)
• Thu–Sat: 1:00 pm–5:00 pm (Thu)
8:00 am–5:00 pm (Fri, Sat)
• Fri–Sun: (weekend)
6:00 pm–10:00 pm (Fri)
8:00 am–5:00 pm (Sat, Sun)



Medical Assistance
Eligibility & the Long-Term
Care Partnership Program

Mandatory 8-Hour Course

In order to sell, solicit, or negotiate a long-term care policy in Minnesota, you are required to complete a specialized one-day course. The Medical Assistance Eligibility & the Long-Term Care Partnership Program course meets this requirement and is approved for 8 hours of Minnesota insurance, Wisconsin insurance, and CFP® CE credit!

Tuition: \$98
Class Time: 8:00 am–5:00 pm

Dates & Locations		
July 27	Monday	BL
September 18	Friday	SP
November 5	Thursday	BL

These courses have been approved by the Commissioner of Commerce pursuant to Minnesota Statute S60K.02, subd. 2 for initial education.

Obtain Your Securities License

- Complete and submit Form U-4 per your employer’s requirement. Once the form is approved, a window will be opened during which you can take the examination.
- Enroll in a Kaplan Financial Education Securities Licensing course four to six weeks before the class date. Call Customer Service at 877.725.7559 or visit www.kaplanfinancial.com/sec-minnesota to register.
- Once your window is open, schedule an exam appointment with Prometric Testing Centers (800.578.6273) or Pearson Vue (866.396.6273). Be sure to schedule your exam before you attend class.
- For optimum results:
 - Complete the recommended pre-study homework prior to class.
 - Plan on homework after class each evening.
 - Set aside two to three days of review after the class, but before taking the exam.
- Take the exam with confidence!

Series 6
Investment Company Products/Variable Contracts Limited Representative

Individuals soliciting the purchase or sale of redeemable securities (mutual funds), variable contracts (variable annuities), and insurance premium funding programs (variable life) issued by insurance companies are required to take this exam.

40–60 hours of pre-study recommended*

Prerequisite: None

Dates & Locations		
July 13–14	Mon–Tue	BL
August 10–11	Mon–Tue	BL
September 8–9	Tue–Wed	BL
October 5–6	Mon–Tue	BL
November 9–10	Mon–Tue	BL
December 7–8	Mon–Tue	BL

Tuition:

\$269

Class Times:

8:30 am–5:00 pm

*Recommended by Kaplan. Actual study time may vary by reading rate, comprehension, professional background, and study environment.

Series 7
General Securities Representative

Individuals soliciting the purchase or sale of corporate, municipal and U.S. government securities, options, direct participation programs, investment company products and variable contracts are required to take this exam.

90–120 hours of pre-study recommended*

Prerequisite: None

Dates & Locations		
July 20–23	Mon–Thu	BL
August 17–20	Mon–Thu	BL
September 14–17	Mon–Thu	BL
October 26–29	Mon–Thu	BL
November 16–19	Mon–Thu	BL
December 14–17	Mon–Thu	BL

Tuition:

\$449

Class Times:

8:30 am–5:00 pm

Series 24
General Securities Principal

This license will allow you to manage or supervise a broker/dealer’s investment banking or securities business for corporate securities, direct participation programs and investment company products and variable contracts.

60–80 hours of pre-study recommended*

Prerequisite: Series 7, 17, 37, 38, 62, 79, or 82

Dates & Locations		
July 27–28	Mon–Tue	BL
September 21–22	Mon–Tue	BL
November 2–3	Mon–Tue	BL

Tuition:

\$449

Class Times:

8:30 am–5:00 pm

Series 65
Uniform Investment Adviser Law Exam

Individuals acting as or soliciting for the service of investment advisers are required to take this exam; other exams may be required as well.

35–75 hours of pre-study recommended*

Prerequisite: None

Dates & Locations		
July 29–30	Wed–Thu	BL
September 23–24	Wed–Thu	BL
November 4–5	Wed–Thu	BL

Tuition:

\$289

Class Times:

8:30 am–5:30 pm

Live Classes Include Online Study Tools

Kaplan’s live licensing classes include online resources to reinforce what you learn in class.

Study anytime, anywhere with:

- InsurancePro™ QBank / SecuritiesPro™ QBank
 - Simulation and multiple-choice questions
 - Topic-specific quizzes
 - Practice exams
- Mastery Exam
- OnDemand Online Video Reviews
- MP3 Audio (Insurance Only)
- InstructorLink™ access

Series 63
Uniform Securities Agent State Law Exam

This is a state qualification examination required of individuals soliciting the purchase or sale of securities within a state. The exam may be required in addition to other exams.

20–30 hours of pre-study recommended*

Prerequisite: None

OnDemand Online Class

Visit www.kaplanfinancial.com/sec-minnesota-series-63 for details.

Tuition:

\$129

Class Length:

5.5 hours

Series 66
Uniform Combined State Law Exam

Individuals acting as or soliciting for the service of investment advisers and soliciting the purchase or sales of securities within a state are required to take this exam. Candidates who take the Series 7 exam may take this exam in lieu of both the Series 63 and Series 65.

35–75 hours of pre-study recommended*

Corequisite: Series 7

Dates & Locations		
July 29–30	Wed–Thu	BL
September 23–24	Wed–Thu	BL
November 4–5	Wed–Thu	BL

Tuition:

\$269

Class Times:

8:30 am–5:30 pm

Surplus Lines Online
Producer Prep | Only \$149

Prepare to become a Surplus Lines Producer on your schedule with Kaplan’s Surplus Lines Online course. The course includes:

- An online, printable PDF textbook
- Ten short instructor-led video sessions covering basic topics and key terms
- A review exam

Adjuster Licensing
Course | Only \$289

Earn the most prominent Adjuster License in the country from almost anywhere! Satisfy the Texas Adjuster precicensing requirement and take the state exam without having to travel to the testing center. Once you have the Texas Adjuster License, you’re eligible to apply for an Adjuster License in multiple states throughout the U.S. with no additional requirements.*

The program includes:

- 40 hours of online exam prep
- Texas Adjuster State License Exam

*Check with your State Department of Insurance to verify how the Texas Adjuster License can be used to adjust in Minnesota.



“The materials that Kaplan provided were excellent, and I could have easily passed the test with just those...”

however, the in-class experience not only heightened the effectiveness of the materials, but also added to the experience and my confidence in taking the test. The instructor was informative, funny, and obviously knew what he was talking about. Honestly, taking a course on insurance sounds dry but the materials and instructor made it quite enjoyable. Thank you!”

—R. Stenersson



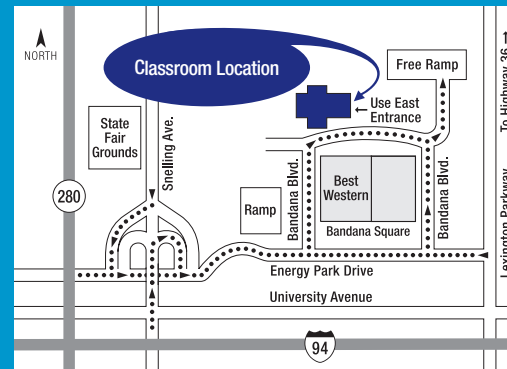
Financial
Education

KAPLAN UNIVERSITY
SCHOOL OF PROFESSIONAL
AND CONTINUING EDUCATION

1295 Bandana Boulevard N., Suite 245
St. Paul, MN 55108
www.kaplanfinancial.com/minnesota | 877.725.7559

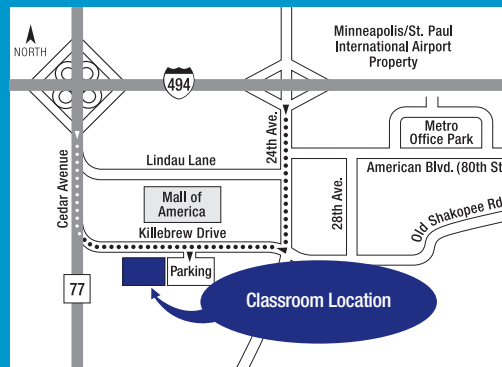


2015 Insurance & Securities Classroom Locations



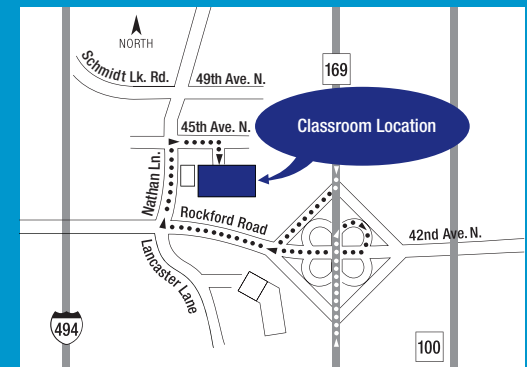
St. Paul

Bandana Square, Atrium Office Building
1295 Bandana Boulevard N., Suite 245, St. Paul, MN



Bloomington

BLN Office Park
2051 Killebrew Drive, Suite 110, Bloomington, MN



Plymouth

MRA
9805 45th Avenue North, Plymouth, MN