



Life & Health Insurance Course Introduction



Welcome to class! Each course is comprised of sections that correspond to the sections found on the examination content outline. The Life & Health Insurance course includes nine sections:

Life

- Section One: Types of Policies
- Section Two: Policy Riders, Provisions, Options and Exclusions
- Section Three: Completing the Application, Underwriting, and Delivering the Policy
- Section Four: Taxes, Retirement and Other Insurance Concepts

Health

- Section One: Types of Policies
- Section Two: Policy Provisions, Clauses, and Riders
- Section Three: Social Insurance
- Section Four: Other Insurance Concepts
- Section Five: Field Underwriting Procedures

Each section has the following four components:

☐	Read		PDF of the information for that topic that you should read first
☐	Watch		Videos for you to watch explaining that section
☐	Watch		Section Essential Concepts to read and watch
☐	Take		Section Review Exam to practice your knowledge

Welcome to class! This Study Plan will be your roadmap to completing all the assignments within the course in two weeks. It includes 2-3 hours of study per day. If you would like to complete your studies in less than 14 days, complete more assignments each day. Good luck!

The course ends with a final exam that is properly weighted.

☐	Take		Final Exam for you to Master
--------------------------	------	--	------------------------------

Step one is to watch the course introduction video and read the glossary. Learning what the words mean will help you **master** the content, setting you up to **pass** the exam!

Date: _____

☒	Watch		Course Introduction Video
☐	Read		Glossary

"Action is the foundational key to all success." - Pablo Picasso



Life & Health Insurance 14-Day Study Plan



This study plan is designed for you to complete the course in two weeks. Depending upon your schedule, you can shorten the time by studying more topics each day, or lengthen the time, as is appropriate for your life.



Now would be an excellent time for you to schedule your exam. You want to make sure to schedule to take it shortly after completing the course, and it may take some time to get into the testing center. You should determine exactly when you will be completing your studies and get the exam scheduled for a day or two immediately after that. You **will** pass!



Tip: Make sure to pass every exam in the course with a 90% or better understanding why the correct answer is correct, and the incorrect answers are incorrect. Do **not** memorize the questions in the course. They will be different on the exam!

Life: Once you complete all the components related to a section, be sure to check the box!



Date: _____

☐

Section 1 - Types of Policies

☐

Read

☐

Watch

☐

Watch

☐

Take



Date: _____

☐

Section 2 - Policy Riders, Provisions, Options and Exclusions

☐

Read

☐

Watch

☐

Watch

☐

Take



Date: _____

☐

Section 3 - Completing the Application, Underwriting, and Delivering the Policy

☐

Read

☐

Watch

☐

Watch

☐

Take



Date: _____

☐

Section 4 - Taxes, Retirement and Other Insurance Concepts

☐

Read

☐

Watch

☐

Watch

☐

Take



Date: _____

☐

Life Insurance Review Exam

☐

Take





Life & Health Insurance

14-Day Study Plan



This study plan is designed for you to complete the course in two weeks. Depending upon your schedule, you can shorten the time by studying more topics each day, or lengthen the time, as is appropriate for your life.



Now would be an excellent time for you to schedule your exam. You want to make sure to schedule to take it shortly after completing the course, and it may take some time to get into the testing center. You should determine exactly when you will be completing your studies and get the exam scheduled for a day or two immediately after that. You **will** pass!



Tip: Make sure to pass every exam in the course with a 90% or better understanding why the correct answer is correct, and the incorrect answers are incorrect. Do **not** memorize the questions in the course. They will be different on the exam!

Health: Once you complete all the components related to a section, be sure to check the box!



Date: _____	☐	Section 1 - Types of Policies	☐	Read	☐	Watch	☐	Watch	☐	Take	☐
Date: _____	☐	Section 2 - Policy Provisions, Clauses, and Riders	☐	Read	☐	Watch	☐	Watch	☐	Take	☐
Date: _____	☐	Section 3 - Social Insurance	☐	Read	☐	Watch	☐	Watch	☐	Take	☐
Date: _____	☐	Section 4 - Other Insurance Concepts	☐	Read	☐	Watch	☐	Watch	☐	Take	☐
Date: _____	☐	Section 5 - Field Underwriting Procedures	☐	Read	☐	Watch	☐	Watch	☐	Take	☐
Date: _____	☐	Health Insurance Review Exam	☐					Take	☐		
Date: _____	☐	Life & Health Insurance Final Exam	☐					Take	☐		





Life & Health Insurance Study Plan



THE DAY OF YOUR EXAM:

Here are some tips that will help you control your stress and anxiety the day of your exam. You may want to try them beforehand to find out which one works best for you:

- **Deep breathing.** Inhale deeply while you count to five and hold the breath for a count of one, then slowly exhale while you count to five. Repeat as many times as necessary.
- **Move your body.** Roll your head in a circle then rotate your shoulders. Shake your hands at your wrists. You should find these movements very relaxing.
- **Visualize your success.** Visualize your happy place. First, figure out where it is. Then, close your eyes and visualize yourself there. This is a great one to practice in advance of your exam.

More specifically, if you feel overwhelmed during your exam, here are some tips you can utilize to calm yourself:

- **Repeat your self-confidence message.** Or, better yet, write it on the scratch paper they give you.

I WILL PASS!!

- **Visualize one more time.** Visualize yourself completing and passing the exam with time to spare.
- **Find an easy question.** They won't all be easy, but there should be some really easy test questions you encounter. Find one and answer it. Completing a question you absolutely know you got right will give you a good confidence boost.
- **Take a mental break.** Face it, the exam is long. You will probably have at least one mental lapse during the exam. If you do, accept it and bring your brain back into focus. Close your eyes and do some deep breathing for a short period, try a 4 count inhale, and a 6 count exhale.

We hope these tips will help you control your exam anxiety and stress. Good luck on your exam.

- The PassMasters Team