

Profiles Professional – Live Web-Based Training Schedule

To register for any of the below sessions, please contact EISI Customer Service at (888) 692-3474, option 6.

Start Planning module

This fast-paced training session covers enough concepts to get you up and running with Profiles Professional software.
There is no cost for this module.

Start planning

- Thursday January 5 10:00 AM CT
- Thursday February 2 10:00 AM CT
- Thursday March 8 10:00 AM CT

Core modules

These modules provide you with the skills to create more detailed plans.
There is no cost for these modules.

Seize income and expense opportunities

- Monday December 5 10:00 AM CT
- Tuesday January 17 10:00 AM CT
- Tuesday February 21 10:00 AM CT
- Monday March 19 10:00 AM CT

Seize asset and liability opportunities

- Tuesday December 6 10:00 AM CT
- Wednesday January 18 10:00 AM CT
- Wednesday February 22 10:00 AM CT
- Tuesday March 20 10:00 AM CT

Build retirement solutions

- Wednesday December 7 10:00 AM CT
- Thursday January 19 10:00 AM CT
- Thursday February 23 10:00 AM CT
- Wednesday March 21 10:00 AM CT

Recommend life insurance strategies

- Thursday December 8 10:00 AM CT
- Friday January 20 10:00 AM CT
- Friday February 24 10:00 AM CT
- Thursday March 22 10:00 AM CT

Elective modules

Use these modules to learn how to treat unique and sophisticated client cases.
There is no cost for these modules.

Disability and long-term care planning

- Monday December 19 10:00 AM CT
- Monday February 27 10:00 AM CT

Education and accumulation goal analysis

- Tuesday December 20 10:00 AM CT
- Tuesday February 28 10:00 AM CT

Estate planning

- Wednesday December 21 10:00 AM CT
- Wednesday February 29 10:00 AM CT

Retirement distribution

- Thursday December 22 10:00 AM CT
- Thursday March 1 10:00 AM CT

Increase sales opportunities with business owners

- Friday March 2 10:00 AM CT

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Length of sessions

Each module is covered in 60-90 minutes. All times are provided in Central Standard Time (CST). Please ensure that you block off this time in your calendar.

Joining the event

You will receive an email from an EISI Training Specialist two business days prior to your scheduled session. The email contains a link to a login screen that verifies your email address, and then lets you join the event. Give yourself enough time (about 15 minutes before the scheduled start time) to login.

Participating in your sessions

Sessions are delivered via the WebEx online training platform. For system requirements, visit:
<http://support.webex.com/support/system-requirements.html>

Contact us

To find out more about your training options or any of these sessions, contact Training at (888) 692-3474, option 5, or email training@eisi.com.