



Live CE Procedures



Step 1: Getting Approved as a CE Instructor

Success Live CE Instructor Qualification Form

Email completed form to Jessie@SuccessCE.com with bio and/or resume
Live CE Director: Jessie Booth

Success Live CE
2 Corporate Plaza Drive, Suite 100 Phone: 949-706-9453 Ext: 115
Newport Beach, CA 92660 Jessie@SuccessCE.com

To secure instructor approval for you to deliver continuing education courses, the information on this form needs to be as complete and accurate as possible.

Personal Information		Company Information	
Legal Name		Company	
Home Address*		Business Address	
Home Phone ()		Business Phone ()	
Mobile Phone ()		Fax ()	
Email		Email	

DOB: _____
SSN: _____
(Have you ever been denied and/or received a formal or informal disciplinary action such as being an instructor (former, suspended, revoked, or terminated)?
YES _____ NO _____ If yes, attach a statement providing complete details.)

*SSN REQUIRED by the Departments of Insurance to obtain instructor approval in FL, NY, SC

Billing Contact:	Phone:
Email:	Billing Address:
Assistant name:	Phone: ()
Email:	

Some states require your signature on the instructor application, we can use a digital signature in most states, do you give success ce permission to duplicate your signature in the states that allow digital signatures? YES _____ NO _____
If yes, please sign in the center of the box below; if no, you will be provided with forms to sign in the states where needed.

X

KCF Page 1 of 2

College/University Name: _____ Years Attended: _____ to _____
Degree/Major: _____
Signature: _____ Date: _____
KCF Page 2 of 2

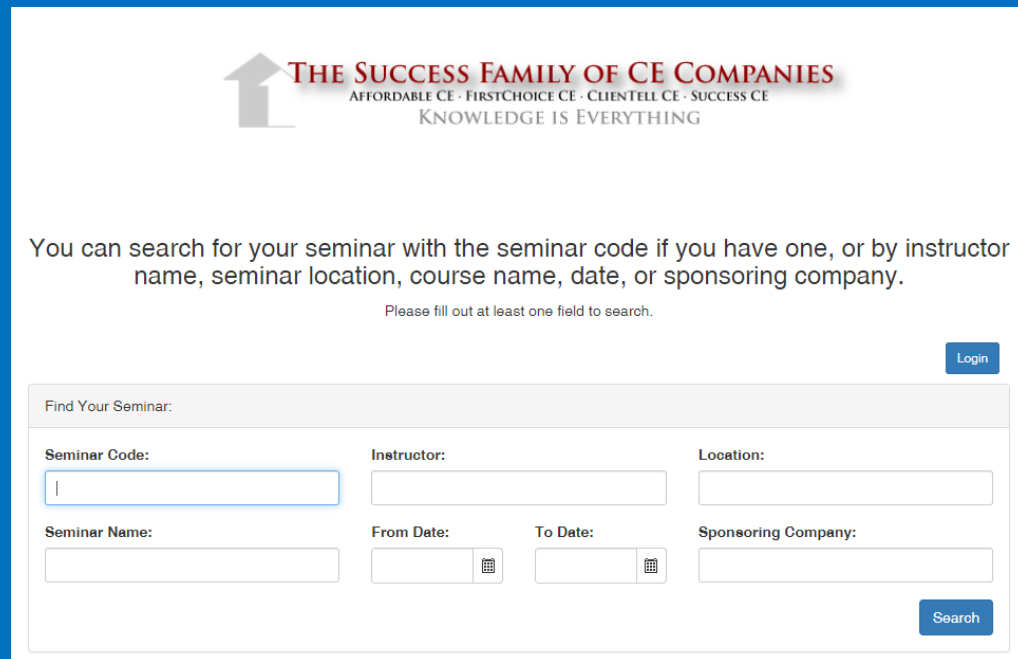
1. Fill out the Instructor Qualification Form in its entirety.
2. Attach resume/biography.
3. Scan and email to your company's CE administrator or Success CE's Live CE Administrative Team.

Step 1: Getting Approved as a CE Instructor



- Success CE prepares and submits the approval paperwork to the states' Department of Insurance and other designation authorities.
- Approval times vary by state. Approval processing may take up to 6 weeks.
- Success CE will notify you once you have been approved.
- An instructor's account will be created by Success CE to ensure ease for the instructor/wholesaler when scheduling seminars, accessing course information and viewing registered attendees in "real-time".

Step 2: Scheduling Your Live CE Event



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KNOWLEDGE IS EVERYTHING

You can search for your seminar with the seminar code if you have one, or by instructor name, seminar location, course name, date, or sponsoring company.

Please fill out at least one field to search.

[Login](#)


Find Your Seminar:

Seminar Code:	Instructor:	Location:	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Seminar Name:	From Date:	To Date:	Sponsoring Company:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Search](#)

1. Using Live Track, our online Live CE/Superior CE website, you will be able to schedule a new event and submit it to Success CE for approval.
2. Once Success CE receives the event information, we will approve the offering and pre-notify the state(s) and any designation(s) requested of the Live CE Offering.

Step 2: Scheduling Your Live CE Event



[state] Uncovering Social Security Secrets
Continuing Education Program
provided by
Success Continuing Education
Provider # [XXXXX]

Date: [date]
Time: [time]
Location: [address]

Hosted By:
Instructed By:

To REGISTER for the seminar
click the link below:
SampleCode123

License	Classroom Credit	Self-Study Credit
CA	1	22 (Meets 3 Hr. Ethics Req.)
CFP	1	10
CLU/ChFC	1	22
IMCA	1	15

[STATE]
Uncovering Social Security
Secrets
Superior CE Event!

Agenda:

[time] – Welcome

[time] – Classroom Course: Annuities:
So Much More than Income

[time] – Exam Course: Indexed
Variable Annuities – Agent Ethical
Decisions

**REGISTRATION IS
MANDATORY & SEATING
IS LIMITED**

Once registration is complete, you
will be redirected to **DOWNLOAD
& REVIEW** your **STUDY MATERIAL**.

In addition, please **PRINT** and
bring a **COPY** of the **POWER POINT
PRESENTATION** to the seminar.
This is the second download
available.

- In order to receive credit you are
required to take an exam and
receive a passing score of 70% or
higher
- Credit hours are subject to
change
- Success CE will report your credits
directly to the state Department of
Insurance and regulatory
authorities

The Continuing Education portion of this seminar is provided by approved Provider: Affordable-Success-Ed280656, (STATE) Provider #: [XXXXX], CFP
Provider #: 124, CIMA Provider #: 135643, CLU/ChFC #: N/A. For questions regarding the CE portion of this program, please call 949-706-8453 and be sure to indicate
your inquiry is pertaining to our Superior CE program.

3. After Pre-Notifying the state(s), Success CE will prepare an Invitation Flyer that you can send out which contains the event information as well as a registration link that will allow any invited attendees to register
 - Instructors/Wholesalers are able to log into Live Track to view the attendees that register for the event in “real-time”.

4. Depending on the shipping delivery date that is selected when scheduling the event on Live Track, Success CE will ship out the Sign-In/Out forms, Exams and any other required forms to the instructor/wholesaler.
 - There is also an option to have a PDF of the forms emailed to you for you to print out the day of the event if you would like to bypass the shipping costs.

Step 3: Day of the Event

**SUCCESS CONTINUING EDUCATION INC.
ATTENDANCE SIGN IN FORM**

Provider Name: Affordable-Success-FirstChoice-Client | Course Location: _____
Course Name: Uncovering Social Security Secrets - Live | _____
Instructor: _____ | _____
Course Date: _____ | Course Time: _____

ATTENDEE: PLEASE COMPLETE THIS SECTION

PLEASE FILL IN ALL REQUESTED INFORMATION AND PRINT LEGIBLY OR YOU WILL NOT RECEIVE CREDIT
Many states REQUIRE the individual license number for Insurance CE or Professional Designation credit

Time In: _____ Attendee Signature: _____
Time Out: _____ Attendee Signature: _____
Home State: _____ State License #: _____
National Producer #: _____
Additional Designation credit available; please fill out info below for designation(s) you would like credit towards:
CFP#: _____ CLU/ChFC#: _____ CIMA#: _____
Full Legal Name: _____ Birthdate: ____/____/____ Last 4 SSN: _____
Home Address: _____
City: _____ State: _____ Zip: _____
Personal Phone: _____
Business Address: _____ Suite #: _____
City: _____ State: _____ Zip: _____
Business Phone: _____ Business Email: _____
Attendee Signature: _____ Date: _____

INSTRUCTOR: PLEASE COMPLETE THIS SECTION

Instructor Signature: _____
Date: _____

*For more information about this class, please contact us at (949) 706-9453 or email info@successce.com.

- The instructor should read the “Instructor Information” page that is included in the package prior to passing out any forms. This form will reiterate what needs to be completed and signed by attendees and also include any state specific requirements/information.
- Instructor/Wholesaler will deliver the seminar, be sure to sign all required forms.

Step 4: After the Event

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Certificate of Course Completion

This certifies that _____
(Student Name) (Agent ID/License Number) (Social Security Number)

has complete our program of continuing education studies, _____
(Course Title) (Course Number)

on _____ for _____ credit hours in the state of _____
(Date of Completion) (Hours) (State)

J. William Cooley
Authorized Signature of Provider/School Official
J. William Cooley - Director

Date

Provider Name

Provider Number

www.AffordableCE.com · 2 Corporate Plaza Drive, Suite 100 · Newport Beach, CA 92660 · Phone: (949) 766-9197

- The instructor/wholesaler should send back all forms (including any extras) with the return envelope that was provided in the package.
 - If forms were initially emailed, we would still need the original forms sent back to Success CE.
- Once Success CE receives the package, we will;
 - Report all credits to the state(s) and/or designations requested
 - Issue Certificates to each attendee, via email.
 - Email the instructor/wholesaler the final attendance roster for the event.
 - Prepare invoice and email to the appropriate contact(s).

* Success CE recommends making back-up copies of the sign in/out forms before mailing

How to Contact Success CE



Mailing Address

Success Continuing Education
Attn: Julia Moyes
2 Corporate Plaza Drive, Suite 100
Newport Beach, CA 92660



Live CE Contact Information

Julia Moyes
JuliaM@SuccessCE.com
(949) 706-9453 ext. 108

Lee Klitzner
LKlitzner@SuccessCE.com
(949) 706-9453 ext. 102