

FINANCIAL AND INSURANCE SERVICES SPECIALIST

Program Number: 10-114-7

Associate of Applied Science Degree

Campus: Beaver Dam, Fond du Lac, West Bend, Online

This program is eligible for financial aid (<http://www.morainepark.edu/financial-aid/>)

This is a unique program focusing on both finance and insurance. Graduates of the Financial and Insurance Services Specialist program are prepared to help clients navigate the complex and evolving worlds of finance and insurance.

About the Program

This program prepares students to obtain industry-recognized credentials required within the financial and insurance industries, including the Series 6, Nationwide Multistate Licensing System (NMLS), and insurance. Students will also gain an understanding of regulatory standards related to Financial Industry Regulatory Authority (FINRA), lending practices, and insurance lines.

Graduates can be employed in support and advising capacities working with clients on financial planning, investment strategies, securities, insurance, pension plans, and real estate.

What You'll Learn

Students will learn about financial and insurance products and services, lending regulations and practices, insurance regulations and practices, client relationship management, and marketing and brand management.

Transfer Opportunities

Your academic journey can continue at a four-year college or university. Earn your associate degree at Moraine Park and then apply those credits toward a bachelor's degree. Starting at MPTC makes completing a bachelor's degree **affordable**, **accessible** and **convenient**. You can go anywhere as MPTC has transfer agreements with colleges and universities both in Wisconsin and throughout the country.

Visit the Transfer to a Four-Year College (<https://www.morainepark.edu/transfer-to-a-four-year-college/>) page for more information on credit transfer agreements between Moraine Park and four-year colleges, both public and private.

Admission Process

Standard Admissions (<http://www.morainepark.edu/admissions/new-student/how-to-apply-for-admissions/>) steps details

Credit for Prior Learning

Transform the skills and abilities developed through previous experience into college credit through MPTC's Credit for Prior Learning process.

- Transfer credit from other colleges/universities
- Earn college credit for your military training and experience
- Earn college credit via Advance Placement, CLEP, DANTES/DSST or MPTC Challenge Exams
- Earn college credit from previous/current work and life experiences

Visit MPTC's Credit for Prior Learning (<https://www.morainepark.edu/academics/credit-for-prior-learning/>) page for more information.

Approximate Costs

Tuition

Occupational

- \$152.85 per credit (resident)
- \$229.28 per credit (out-of-state resident)

Associate of Arts/Associate of Science

- \$192.20 per credit (resident)
- \$288.30 per credit (out-of-state resident)

Online students are not charged out-of-state fees.

Student Fees

- \$5.00 minimum per course Material Fee
- \$13.76 per-credit Supplemental Fee for Undergraduate courses
- \$4.50 per term mandatory Student Accident Insurance Fee

Please refer to Tuition & Fee Information (<https://catalog.morainepark.edu/admissions-registration/tuition-fee-information/>) for additional enrollment fee information.

Financial Aid

Financial Aid is available for associate degree and technical diploma programs (those that are 2 semesters in length and typically with 28 credits or more). Processing can take 4-5 weeks after a student's completed Free Application for Federal Student Aid (FAFSA (<https://studentaid.gov/h/apply-for-aid/fafsa/>)) is received.

Several factors influence the total cost of your degree, including enrollment fees, the number of credits required, textbooks and equipment. **Financial aid** (<https://www.morainepark.edu/pay-for-college/financial-aid/>) can assist with those costs.

Course Requirements

Course	Title	Credits
Semester 1		
101-134	Introduction to Finance	3
103-159	Computer Literacy - Microsoft Office	1
104-102	Marketing Principles	3
114-101	Financial and Insurance Fundamentals	1
801-136	English Composition 1	3
890-101	College 101	2
Mathematics Course (https://catalog.morainepark.edu/academic-programming/general-education/mathematics/)		3
Credits		16
Semester 2		
101-112	Accounting 1	4
102-110	Introduction to Business	3
105-160	Business Law	3
101-138	Data Management, Analysis and Reporting	3
Social Science Course (https://catalog.morainepark.edu/academic-programming/general-education/behavioral-social-science/)		3
Credits		16
Semester 3		
101-123	Income Tax Accounting	3

104-135	Customer Relationship Management	3
114-103	Financial Service Lines	3
114-105	Insurance Service Lines	3
Communication Course (https://catalog.morainepark.edu/academic-programming/general-education/communications/)		3
Behavioral Science Course (https://catalog.morainepark.edu/academic-programming/general-education/behavioral-social-science/)		3
Credits		18
Semester 4		
103-185	Microsoft Collaboration	3
105-158	Personal Brand	2
114-107	Financial Wealth Management	3
114-109	Securities Industry - Concepts to Compliance	3
Social Science Course (https://catalog.morainepark.edu/academic-programming/general-education/behavioral-social-science/)		3
Credits		14
Total Credits		64

Program Outcomes

- Conduct financial and insurance services research
- Analyze financial and insurance data
- Manage client relationships
- Recommend financial and insurance products and services

Career Opportunities

- Certified Financial Planner (CFP)
- Customer Service Representative
- Financial Advisory
- Insurance Sales Agent
- Loan Processor
- Personal Banker