

# 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

Earn credits at MPTC and transfer to a four-year college to earn your bachelor's degree.

Visit the Transfer to a Four-Year College (<https://www.morainepark.edu/academics/transfer-information/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

Earn college credit outside the classroom through Moraine Park's Credit for Prior Learning (CPL) opportunities. Credit opportunities are available for:

- Previous college coursework from prior institutions
- Military training and experience
- Passing of MPTC or national exams
- Skills or knowledge developed on the job or through other life experiences

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

## Approximate Costs

### Tuition

#### Occupational

- \$146.20 per credit (resident)
- \$219.30 per credit (out-of-state resident)

#### Associate of Arts/Associate of Science

- \$188.90 per credit (resident)
- \$283.35 per credit (out-of-state resident)

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

### Student Fees

- \$4.50 minimum per course Material Fee
- \$12.50 per-credit Supplemental Fee for Undergraduate courses
- \$10 minimum per credit Online Course Fee (Fee suspended for 2023-2024)
- \$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. Visit the Financial Aid (<https://www.morainepark.edu/pay-for-college/financial-aid/>) page to learn more.

## Course Requirements

Course	Title	Credits
<b>Semester 1</b>		
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 ( <a href="https://catalog.morainepark.edu/academic-programming/general-education/mathematics/">https://catalog.morainepark.edu/academic-programming/general-education/mathematics/</a> )		3
<b>Credits</b>		<b>16</b>
<b>Semester 2</b>		
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 ( <a href="https://catalog.morainepark.edu/academic-programming/general-education/behavioral-social-science/">https://catalog.morainepark.edu/academic-programming/general-education/behavioral-social-science/</a> )		3
<b>Credits</b>		<b>16</b>
<b>Semester 3</b>		
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 ( <a href="https://catalog.morainepark.edu/academic-programming/general-education/communications/">https://catalog.morainepark.edu/academic-programming/general-education/communications/</a> )	3
Behavioral Science Course ( <a href="https://catalog.morainepark.edu/academic-programming/general-education/behavioral-social-science/">https://catalog.morainepark.edu/academic-programming/general-education/behavioral-social-science/</a> )	3
<b>Credits</b>	<b>18</b>
<b>Semester 4</b>	
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 ( <a href="https://catalog.morainepark.edu/academic-programming/general-education/behavioral-social-science/">https://catalog.morainepark.edu/academic-programming/general-education/behavioral-social-science/</a> )	3
<b>Credits</b>	<b>14</b>
<b>Total Credits</b>	<b>64</b>

## 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