



# Higher Education Memorandum From

## Keir Educational Resources

August 2012

### University Achieves 100% Pass Rate Using Keir Textbooks and Review Program

We have to crow a little! One of our university classes has accomplished a huge goal! This past year The Ohio State University, under the lead of Dr. Bill Rives CLU®, ChFC® made a switch to the Keir CFP® Certification Examination textbooks for the six individual courses. They had been using the Keir Review package for several years, but decided to adopt the entire program.



The class receiving this material was what we call a “general public” class. They were not from any one company. They were not from any one line (investments, insurance, planning, tax, etc). They held business degrees, history degrees, even an electronics degree. Nothing specialized. This was just a random group all desiring to be CFP® certificants. There were 20 students. One of the students was a second time test taker.

Students commented that they liked the textbooks because they were consolidated and easy to follow with the topic approach. The questions were popular with everyone! Many commented on the rationales being so easy to understand and helping to reinforce the material. The use of cases in each individual course helped them to better prepare for the comprehensive cases on the actual exam. The review packages they loved for the many questions and cases.

Each class was taught by Jeff Rattiner CFP®, CPA, who has many years of experience with the CFP® Certification Examination. Jeff is president and CEO of The JR Financial Group, Inc. Beside his book knowledge, he brings a vast array of financial planning experiences to the class that makes it that much more real.

Every single student enrolled in this class who took the CFP® Certification Examination for the first time passed! Can you boast of such an accomplishment? Besides this group using the textbooks plus the review package, for the March 2012 exam cycle, two of our general public review classes returned 100% pass rates. No little accomplishment there. Many years of experience along with great teachers. We are proud!

### Pre-licensing Needs?

Keir just recently returned home from the Program Directors Conference in Washington D.C. We had a few Program Directors mention to us that they encourage their students to go ahead and obtain their state licenses prior to the job search. Having this already accomplished when interviewing certainly makes one more marketable to an insurance or finance company. It is a win-win. The company saves on

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their budget and the student gets a leg up on other candidates. Encourage your students to get their pre-license for life, accident & health or property & casualty. Visit <https://keir.examfx.com>.

## CFP® Certificants Generate High Revenue

Have you seen the latest article by Mark Schoeff Jr. in **Investment News**. The article is entitled “CFPs generate substantially higher revenue than other IAs: CFP survey”. A recent survey was conducted by the Alite Group LLC for the Certified Financial Planner Board of Standards Inc. Here are some findings:

- CFP® certificants in a solo practice generate 40% to 100% more revenue than non-CFPs
- CFP® certificants who are part of a team earn approximately 30% more
- CFP® certificants at insurance broker-dealers generate 113% more revenue than other advisers
  - At wirehouses – 18% more
  - At independent broker-dealers – 67% more
- CFP® certificants with more than 10 years of experience earn more than \$215,000



To read the full article visit <http://www.investmentnews.com/article/20120731/FREE/120739981>. It is a great article to share with your instructors, students and corporate clients. The results are very positive and encouraging for the future growth of CFP® related education.

## Join Our Editorial Board: 3rd Edition of Financial Plan Development Text

What: A webinar

When: Monday –September 10<sup>th</sup> from 3-4:00 p.m. EST

Why: Keir Educational Resources will be conducting a one hour call to discuss the details of our new third edition Financial Plan Development textbook. Learn how this material can help you with your Financial Plan Development course. Our staff will highlight the details of the textbook, the supporting online excel file and instructor materials.

Who: Conducting this webinar will be –

\*Keir’s Chairman John Keir, JD

\*Keir’s Lead Editor & Instructor, Sherri Donaldson, CFP®, ChFC®, MSFS, CASL®, CAP®

\*Keir’s Instructor, James Tissot, CFP®

How: Contact Keir at 800-795-5347, ext. 101 or 107 to register.

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