



product offerings

Securities Training

- ✔ Series 3
- ✔ Series 4
- ✔ Series 6
- ✔ Series 7
- ✔ Series 9
- ✔ Series 10
- ✔ Series 11
- ✔ Series 17
- ✔ Series 24
- ✔ Series 26
- ✔ Series 27
- ✔ Series 31
- ✔ Series 50
- ✔ Series 51
- ✔ Series 53
- ✔ Series 57
- ✔ Series 63
- ✔ Series 65
- ✔ Series 66
- ✔ Series 82
- ✔ Series 99



Pass Perfect

based out of Greenwich, CT

est. 1967

Founder Ed Fleur

30 years

successfully trained over 1,000,000 individuals

\$0

insurance + ce licensing

estimated revenue

\$3-5m

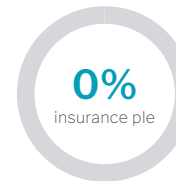
securities licensing

customer voice



Competitive training programs cover 80% of the test content, so our students must get 90% correct on that material to pass the exam. With Pass Perfect, 90% of the test content is covered, so our students only need to get 80% on that material to pass the exam.

report card



key securities clients



JPMORGAN CHASE & CO.



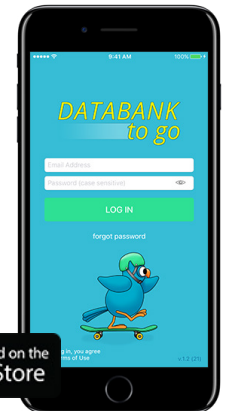
product highlights



Sold Individually or Bundled



New Study on the Go Mobile App



pricing packages features	PRINTED MATERIALS - Printed Textbooks - Printed Exams	INTERACTIVE WEB TRAINING - Online Textbooks - Practice Questions - Final Exams - Quick Summary - Searchable Glossary	DATABANK PRACTICE EXAMS - Unit Quizzes - Midterms - Final Exams - Mastery Exams	LIVE VIRTUAL CLASSROOM REVIEW	Live Virtual Review Frequency	Question Pools	Access
Series 6	\$90	\$115	\$75	\$250	3 days; monthly	4,000	12 mons Online 1x Live Virtual Review
Series 7	\$250	\$150	\$150	\$275	5 days; 1-3 month	8,000	
Series 24	\$300	☒	\$175	\$250	4 days; monthly	2,000	
Series 63	\$70	\$100	\$85	\$125	1 day; monthly	1,600	
Series 65	\$135	\$135	\$125	\$250	5 days; 1-3 month	5,000	
Series 66	\$150	\$125	\$125	\$250	5 days; 1-3 month	4,000	

our position

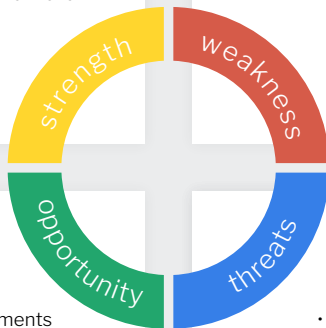
- ✓ We are an alternate **national** provider with clear concise material.
- ✓ Sales and service teams are **helpful, knowledgeable** and **available**.
- ✓ Our programs are all online, requiring **no added print cost**.
- ✓ We provide comprehensive testing, to **eliminate memorization** and **false positives reports**.
- ✓ We back our product with a **guarantee**.

how to win

- ✓ Less **resources/capital** for service and product updates.
- ✓ Content is often **out of date**.
- ✓ Only offers securities - leverage **insurance** and **securities** solution.
- ✓ Training becomes **repetitive** and **wasteful**.
- ✓ Technology and platform is **antiquated**.

- 30 Years Experience
- Diverse Securities Portfolio
- Questions Banks

- Limited Investment Capital
- Uses Affiliates for Live Classes
- Material Often Out of Date
- Limited Resources
- Product Diversity




- Technology Investments
- SIE Market

- Adapt for SIE Market


objection handling

- Our pass rates are fine...


Ask about their overall through put vs pass rate. We also stand by our product with a pass or money back.


- Our vendor includes printed products...


We offer print products as an add on because our clients have found our online solution is more convenient and just as effective. If you prefer to include print products, we can make that happen.


- Our vendor is fine...

What is it you like or don't like about your current vendor?


- We need Live In-Person Training...

Why do you feel that is a need? Our Live Online solution offers an interactive and effective classroom experience that is more cost efficient and can accommodate users nationwide.


- Our current product is free (or discounted)...

Have you considered why your current vendor does this? Maintaining accurate content, investing in platforms and staying in compliance with state regulations often is expensive for vendors and that cost is built in to our pricing. Education is state mandated for the majority of insurance licensees. Being out of compliance with regulations is a liability for you, your candidates, and your company.

