TESTIMONIALS

“The CLU is a well-regarded designation that instills confidence in clients and the firms you partner with. It helps you lead enriched conversations with high net worth clients and business owners, and enhances your ability to improve customer value within more complex or sophisticated situations.”

Nick Pszeniczny

“Your decision to obtain your CLU will be one of the most important career steps you take.
The designation brings you the knowledge to work in advanced insurance markets, the confidence to work with your clients’ other professional advisors, and the professionalism to bring the best possible solutions to those clients.”

Jim Virtue

“The CLU program provides a greater depth of understanding of taxation, estate planning and insurance concepts. With this advanced knowledge base, a CLU holder can deliver strategic financial planning advice to sophisticated clients – from high net worth individuals to small business owners and incorporated professionals. As financial products and services become increasingly commoditized, the CLU designation differentiates a financial advisor’s expertise level so that one can add maximum value in every client situation.”

Susan Smythe

“Studying for my CLU designation has exposed me to a wide breadth of material in the areas of law, taxation and estate planning; this learning that has proven invaluable in working with my clients and to better understand their unique life circumstance and personal need. This experience has also strongly reinforced the power of collaborating with other professionals to enhance the value we all bring to our clients. The CLU curriculum has also provided me with a solid foundation to continue to expand my knowledge and deepen my value to my clients.”

Victoria Reynolds

“The CLU program has allowed me to take the strategies and knowledge learned from previously completed designations and bring them together in a comprehensive way to develop strategies for clients that maximize their situation both while alive, and for their estates. I would absolutely recommend this program to my colleagues working within the financial field.”

Rebekah Earle

“The CLU program covers a variety of practical topics in the areas of tax, law and estate planning, arming advisors in the financial services industry with an enhanced ability to identify needs, warn of pitfalls, and help develop potential solutions for their clients.”

Patrick Uzan

“The CLU provides you with understanding of the impact of longevity, taxes and returns on retirement and lifestyle. It gives insight into basic financial planning regarding debt to income and asset to liabilities. It is the single most powerful designation that an advisor can possess today.”

Anonymous

“Those who know what a CLU designation is are usually the clients who are best served by it. Having the designation will instill more faith in the client of my ability to perform the way they need, and trust they are in good hands.”

Anonymous