

# Your Path to a Successful Career

## A Development Path Designed for Agents and Brokers

As a producer, it is important to continuously enhance your insurance knowledge and skills so that you can establish a clear professional advantage in the marketplace. To help you maintain your competitive edge, The Institutes offer a wide range of insurance education programs so you can gain the technical insurance knowledge and skills you need for a successful career.

Use this development path to help achieve your professional goals. Additionally, you can obtain continuing education (CE) credits for passing many of our credentialing exams.

Before you begin, consider your current industry background and experience, as that will help you determine which course to start with.



### Flexible Delivery:



Print — Textbook and study aids



Online — Online self-study modules

To learn more details regarding a specific course, please visit [www.TheInstitutes.org](http://www.TheInstitutes.org), or contact Customer Service at (800) 644-2101.

### Phases:

**Phase 1:** These courses correspond roughly with your first year in the property-casualty insurance industry, and provide a solid foundation for successful career-long professional development.

**Phase 2:** Once you have an overall understanding of the industry, choose the track that best suits your professional needs to gain more technical knowledge.

**Phase 3:** These programs ensure that professional development continues throughout your career, allowing you to stay current on the latest industry practices and refine your technical insurance knowledge.

## My Professional Development Planner



Self-Study  
Print



Self-Study  
Online

Name:

Courses	Delivery Mode	Date Completed
<b>PHASE I</b>		
<b>Insurance Essentials</b>		
<b>Introduction to Property and Casualty Insurance</b>		
<b>PHASE II</b>		
<b>Ethical Guidelines for Insurance Professionals or Ethics and the CPCU Code of Professional Conduct</b>		
<b>Associate in General Insurance (AINS®)—Choose 1 of 4 tracks below</b>		
<b>Agent Broker Track</b>		
<b>AINS 21 Property and Liability Insurance Principles</b>		
<b>AINS 23 Commercial Insurance</b>		
<b>AAI 83 Agency Operations and Sales Management</b>		

# My Professional Development Planner



## Courses

## Delivery Mode

## Date Completed

### PHASE II

#### Risk Management Track

AINS 21 Property and Liability Insurance Principles



AINS 23 Commercial Insurance



ARM 54 Risk Management Principles and Practices or



ARM 55 Risk Assessment and Treatment or



ARM 56 Risk Financing



#### Commercial Property Track

AINS 21 Property and Liability Insurance Principles



AINS 23 Commercial Insurance



AU 61 Underwriting Commercial Property



#### Commercial Liability Track

AINS 21 Property and Liability Insurance Principles



AINS 23 Commercial Insurance



AU 62 Underwriting Commercial Liability



AIS 25 Delivering Insurance Services



### PHASE III

#### Accredited Advisor in Insurance (AAI®)

AAI 81 Foundations of Insurance Production



AAI 82 Multiple-Lines Insurance Production



AAI 83 Agency Operations and Sales Management



#### Accredited Advisor in Insurance (AAI-M™)

AAI 87 Agency Leadership and Strategic Alignment



#### Associate in Risk Management (ARM™)

ARM 54 Risk Management Principles and Practices



ARM 55 Risk Assessment and Treatment



ARM 56 Risk Financing



#### Chartered Property Casualty Underwriter (CPCU®)—Commercial

CPCU 500 Foundations of Risk Management and Insurance



CPCU 520 Insurance Operations



CPCU 530 Business Law for Insurance Professionals



CPCU 540 Finance and Accounting for Insurance Professionals



CPCU 551 Commercial Property Risk Management Insurance



CPCU 552 Commercial Liability Risk Management and Insurance



CPCU 553 Survey of Personal Insurance and Financial Planning



CPCU Elective Course Selection

### Compliance

CEU.com CE approved courses as needed based on state licensing requirements