

Professional Development Paths

| Customer Service Development Path | | |
|-----------------------------------|---|---------------|
| Courses | | Delivery Mode |
| PHASE 1 | Successful Starts for CSR's | 0 |
| | Introduction to Property & Liability | P, 0 |
| PHASE 2 | Ethical Guidelines for Insurance Professionals | 0 |
| | Accredited Customer Service Representative (ACSR)—Choose 1 of 3 tracks below | |
| | Commercial Lines Track | |
| | ACSR 4—Errors & Omissions/Loss Control | P, 0 |
| | ACSR 5—Professional Development | P, 0 |
| | ACSR 6—Commercial Property Insurance | P, 0 |
| | ACSR 7—Commercial Liability Insurance | P, 0 |
| | ACSR 8—Commercial Auto Insurance | P, 0 |
| | ACSR 9—Commercial Lines Related Coverages | P, 0 |
| | Personal Lines Track | |
| | ACSR 1—Homeowners | P, 0 |
| | ACSR 2—Personal Automobile Insurance | P, 0 |
| | ACSR 3—Personal Lines Related Coverages | P, 0 |
| | ACSR 4—Errors & Omissions/Loss Control | P, 0 |
| | ACSR 5—Professional Development | P, 0 |
| | Life and Health Track | |
| | ACSR 4—Errors & Omissions/Loss Control | P, 0 |
| | ACSR 5—Professional Development | P, 0 |
| | ACSR 10—Life Insurance | P, 0 |
| | ACSR 11—Retirement Planning | P, 0 |
| | ACSR 12—Disability and Health Insurance | P, 0 |
| | Associate in Insurance Services (AIS) | |
| | AIS 25—Delivering Insurance Services | P, 0 |
| PHASE 3 | Accredited Advisor in Insurance (AAI) | |
| | AAI 81—Foundations of Insurance Production | P, 0 |
| | AAI 82—Multiple Lines Insurance Production | P, 0 |
| | AAI 83—Agency Operations & Sales Management | P, 0 |
| | Accredited Adviser in Insurance—Management (AAI-M) | |
| | AAI 87—Agency Leadership and Strategic Alignment | P, 0 |
| | Chartered Property Casualty Underwriter (CPCU)—Commercial | |
| | CPCU 500—Foundations of Risk Management and Insurance | P, 0 |
| | CPCU 520—Insurance Operations | P, 0 |
| | CPCU 530—Business Law for Insurance Professionals | P, 0 |
| | CPCU 540—Finance and Accounting for Insurance Professionals | P, 0 |
| | CPCU 551—Commercial Property Insurance & Risk Management | P, 0 |
| | CPCU 552—Commercial Liability Insurance & Risk Management | P, 0 |
| | CPCU 553—Survey of Personal Risk Management, Insurance and Financial Planning | P, 0 |
| | CPCU Elective Course Selection | |
| Compliance | CEU CE approved courses as needed based on state licensing requirements | |