

CPD Guidelines

This sheet attempts to answer some Frequently Asked Questions.

Additional questions about completing the application or how to count an activity may be answered by calling (610) 644-2100, ext. 7631 or by sending an e-mail to cpd@TheInstitutes.org.

Note: CPD is a voluntary program that is used to recognize CPCUs for their continued attention to professionalism.

How to Become CPD Qualified

Please check your category to determine what you need to do:

| Your CPD Status | You Earn Points | Qualification Period |
|--|--|---|
| New designee <i>(no need to file)</i> | Automatic by having completed CPCU | 2 years from eligibility to use the CPCU designation |
| Not currently qualified <i>(either expired or never qualified)</i> | In the 2 years preceding date of application | 2 years from month of application |
| Currently qualified | Only during the period of current qualification | Add 2 full years to current expiration |

Examples

Note: Documentation is not required for individual activities that are submitted for credit on the CPD application. CPD submissions are randomly audited, and CPCUs may be asked to document any activity that is submitted on a CPD application.

| CPD Status | Applied | Qualified Through |
|--------------------------------|--|---|
| New designee | September 2008 completer January 2009 completer June 2009 completer | November 2010 March 2011 August 2011 |
| Not currently qualified | January 2009 | January 2011 |
| Currently qualified | Currently qualified to December 2009 and submitted new application in November 2009 | December 2011 |

Specific PD Sections

All work must be completed before it is eligible for submission on the CPD Application.

PD-1: All IIA, retakes of CPCU, CLU, FLMI, ChFC, RHU, CIC designation exams.

All business-related courses, such as MBA, Master's, Financial, Information Systems. American Educational Institute (AEI) (40 points for completion of entire module, 12 ½ points for each exam, maximum 40 points). All non-designation courses such as SM, INTRO earn 15 points. L/H pre-licensing and licensing courses/exams earn 15 points. No points earned for P&C pre-licensing/licensing courses/exams.

PD-5: CPCU Society Center for Leadership courses offered at CPCU Society Annual Meeting based on number of hours (in addition to Annual Meeting attendance). NAIC—must attend all four meetings to earn 10 points.

PD-6: All seminars, workshops, and lectures attended to meet CE requirements. Please provide sponsoring organization, topic, and program length. You may claim either 1-day attendance or the CE earned at the 1-day session, not both. Ruble Seminars and CIC Institute updates (if you did not take or pass the exam) count for 15 points.



FOR INSTITUTE USE ONLY

REC'D _____ INITIAL _____
 C/Y _____ C/N _____ N/N _____ PAID _____ CERT. ORDERED _____
 QUAL. _____ EXPIRED _____

New Renewal Date of Application _____

Name: _____
Last First Middle

Employer: _____ Business Telephone Number: _____

I am a member of the following chapter: _____ Designation Year: _____

Address: _____

City: _____ State: _____ Zip: _____

Preferred Address: Business Home Please check if change of address E-Mail Address: _____

To qualify, you must earn 60 points during the previous two-year period. Please check the facing page prior to completing this form.

Leave Shaded Area Blank.

| Professional Development Activity | Activity Details | Date | Points Requested | Points Approved |
|---|---|------|------------------|-----------------|
| PD-1 PASS Exam The Institutes' or actuarial exams—45 Points each Other exams related to nationally known insurance designation or business-related program—40 points per exam Non-designation exams—15 points (Does not include licensing or pre-licensing P&C exams) Course/Exam College or University accredited course in insurance, risk management, or business related subject—12 ½ points per credit The Institutes' online courses—1 point per PD hour | Provide exam, designation associated with, and date of completion or course name, college or university, date, and number credits earned. | | | |
| PD-2 TEACH (other than for current position) A complete course of types shown in PD-1 (30 points for Institutes' course, 25 points all others—once per semester; pro-rata allocation of at least 1/3 taught) Serve as instructor, speaker, or moderator for seminars, workshops, educational meetings, etc. (Points are based on number of classroom hours, maximum 25 points.) | Provide course name, date, and sponsor's name. | | | |
| PD-3 AUTHOR OR COAUTHOR Article accepted for publication in CPCU eJournal, interest group newsletter, or similar business publication—25 points Article accepted for publication in Chaptergram or chapter Web site—15 points Chapter research project chairman (30 points)/participant—25 points Textbook—60 points Revisions of same—25 points | Provide title, edition, publication date, number of pages. | | | |
| PD-4 SERVE (continued on reverse) As a volunteer for the CPCU Society or another insurance organization. (15 points per year—must complete term) | Includes service as an officer, board member, leader, coordinator, champion, and task force member. | | | |

| Professional Development Activity | Activity Details | Date | Points Requested | Points Approved |
|--|---|------|------------------|-----------------|
| <p>PD-4 SERVE (continued) Program/class coordinator for CPCU Society chapter or course-sponsoring organization—15 points per year</p> <p>Member of State Insurance Advisory Committee—15 points per year The Institutes grader—10-15 points per exam series—maximum 45 points</p> <p>The Institutes question writer—10-20 points per writing assignment, overall maximum 40 points</p> <p>The Institutes question reviewer or Exam Review Committee service—20 points per year</p> <p>Other insurance organization exam question writer—15 points per year Other insurance organization question reviewer or Exam Review Committee service—15 points per year</p> <p>Other activities that should be considered (with explanation,—no points for exam proctor)</p> | | | | |
| <p>PD-5 ATTEND NATIONAL EDUCATION MEETINGS CPCU Society Annual Meeting and Seminars—20 points</p> <p>Annual meetings of other national insurance organizations—CLU, LOMA, IIABA, IRIS, ACORD, IVANS, RIMS, ARIA, etc.—10 points</p> | Provide sponsoring organization and dates. List date of seminar and number of CE credits. | | | |
| <p>PD-6 ATTEND CPCU SOCIETY CENTER FOR LEADERSHIP COURSES, TECHNICAL WORKSHOPS/SEMINARS/CE COURSES CPCU Society Center for Leadership Course—1 point per contact hour</p> <p>CPCU Society chapter meetings that include a speaker or educational program—15 points/year, 1 point per meeting</p> <p>Industry Day (I-Day)—4 points</p> <p>Workshop/seminar/CE course —1 point per contact hour</p> | Indicate sponsoring organization, topic, and program length. | | | |
| <p>PD-7 PERFORM Expert witness—10 points per year; 20 points maximum</p> <p>Personal sponsorship—5 points; 10 points maximum; company liaison in Personal Contact Campaign—10 points maximum</p> | Provide appropriate explanation. | | | |

Certificates are optional.

The cost of a certificate is a one-time fee of \$25. Thereafter, stickers for updating qualification periods will be mailed free of charge at renewal.

- I request a certificate. Enclosed is my check for \$25 made payable to The Institutes.
- I do not want a certificate.
- I request a sticker for updating qualification periods.
- If you would prefer to have your certificate mailed to your employer for presentation, please provide us with the following information:

Company Name: _____ **Att:** _____

Address: _____

_____, CPCU

Full name as you wish it to appear on your certificate: *(Type or Print)*

I certify that the above statements are complete and true and are made in full compliance with the CPCU Code of Professional Conduct of The Institutes and the CPCU Society's Code of Ethics. I understand that CPD applications are randomly audited and I may be asked to document any activity I submitted on this form.

Signature of applicant required: _____ **Date** _____

Send completed form to: Continuing Education; The Institutes 720 Providence Road, Suite 100; Malvern, PA 19355-3433

Continuing Professional Development

Application & Guidelines

CPD A Continuing Education Recognition Program
 Powered by CPCU Society and The Institutes