

The Accredited Adviser in Insurance program gives you the tools you need to establish a clear professional advantage in the marketplace and fulfill your commitment to customer service. In today's increasingly complex property-casualty marketplace, producers with in-depth insurance knowledge and a strong focus on customer service have a competitive edge.

Seminar Titles and General Topics

AAI 81: Foundations of Insurance Production—Segments:

- A—Principles of Insurance: Insurance and the Legal System, Risk Management and the Producer, and Sales and Account Development
- B—Personal Insurance: Homeowners Insurance and Personal Auto, Other Personal Lines, and Personal Financial Planning
- C—Commercial Property Insurance: Commercial Property, Business Income and Extra Expense, and Commercial Inland Marine Insurance

AAI 82: Multiple-Lines Insurance Production—Segments:

- A—Commercial Liability Insurance: Commercial General Liability Insurance, Commercial Auto, and Garage and Motor Carrier Insurance
- B—Other Commercial Insurance: Commercial Crime, Business-Owners, Other Commercial Coverages, and Workers Compensation and Employers Liability
- C—Specialized Insurance and Bonds: Specialty Property, Excess and Umbrella, Ocean Marine and Aviation Insurance, and Surety Bonds

AAI 83: Agency Operations and Sales Management—Segments:

- A—Principles of Agency Management: Agency Formation/Environment, Organizational Management, Agency Sales Management, and Personal Production Plans
- B—The Insurance Product Environment: Producer-Insurer Relationships, Agency Image, Agency Growth/Customer Communications, and Market Segmentation/Target Marketing
- C—Agency Management Tools and Processes: Agency Information Technology, Management of Customer Services, Financial Management, and Legal and Ethical Responsibilities

Course Level: Intermediate

Exams: Nine

Completer Info: Passing the required exams earns the designation.

We Recommend AAI for: Agents/brokers, agency principals, and customer service representatives

Sequence: We recommend taking AAI 81 before AAI 82. AAI 83 can be taken at any time.

Waiver Info: See our Web site for full details.

Traditional Course Option: AAI is also offered as self-study and in-person classes (subject to availability).

Study Aids

Available for select Institutes courses, SMART Study Aids help you retain key concepts by supplementing course materials. The Review Notes and Flash Cards allow you to maximize your study time, while the new SMART Online Practice Exams are as close as you can get to experiencing an actual exam before taking one.

Online Courses

Online learning powered by COMET is the revolutionary Web-based learning tool that delivers the Institutes' respected technical insurance content in smaller pieces. Try it for yourself—visit www.aicpcu.org/COMET.

Questions?

For more information and to take advantage of the Institutes' free educational advising service, please call Customer Service at (800) 644-2101 or e-mail customerservice@cpcuiia.org. You can also visit us on the Web at www.aicpcu.org, where you will find everything you need to know about registering and studying, including a complete course catalog. We're here to help you succeed on your professional development path!

About the Institutes

The American Institute for CPCU/Insurance Institute of America are not-for-profit organizations offering knowledge solutions and professional development services to the risk management and property-casualty insurance community. The Institutes offer the CPCU designation program; associate designation programs in areas such as claims, risk management, underwriting, and reinsurance; introductory and foundation programs; and online courses, all of which help drive better decision making to propel business success.

“AAI is a manual for operating an agency. The AAI program is an authoritative educational source that provides significant insight into business, law, finance, marketing, sales, insurance coverages, and insurance agency operations. It is a requisite to meeting the knowledge demands of our profession and the risk management needs of our customers.”

~Brian Francis, ARM, AAI
President
Property & Casualty Solutions

Your Professional Development Planner

PHASE I

To fully understand the insurance industry and develop the ability to apply industry fundamentals in your daily work, you need a solid foundation in core concepts and industry principles.

Insurance Essentials

Online Learning:

Company-Specific Training:

Introduction to:

PHASE II

Once you have an overall understanding of the industry, you'll be able to benefit from more-technical knowledge. Choose a generalist (G) or specialist (S) approach, depending on your needs.

Program in General Insurance (G)

Online Learning (S):

Accredited Adviser in Insurance (S)

CPCU (G)

Company-Specific Training (S):

PHASE III

Professional development should continue throughout your career so you can stay current on the latest industry practices and refine your technical insurance knowledge.

Online Learning:

Associate in:

CPCU

Company-Specific Training: