

# 2009 Registration Booklet for Exams-on-Request (EOR) Examinations

**Note:** Use this booklet to register only for exams in Exams-on-Request (EOR) programs. For CPCU and other IIA programs, use the registration booklet that accompanies the study materials for those programs.

## Exam Information and Study Materials

Assessment is an integral part of all Institute courses. Exams let you demonstrate that you have accomplished the educational objectives for a given course and have mastered its content. You will earn a certificate of completion after you receive a passing grade on the exam for a specific program. Information about the Institutes' educational programs is available at our Web site, [www.aicpcu.org](http://www.aicpcu.org), and in our catalog, which can be downloaded from the Web site.

For 2009, changes have been made to Institute study materials. Be sure you have the correct edition of the course guide and textbook(s) for the testing window in which you plan to take your exam. A current list of study material changes is available at [www.aicpcu.org/doc/2009StudyMaterialChanges](http://www.aicpcu.org/doc/2009StudyMaterialChanges). As an alternative and if you register by telephone, ask a Customer Service representative about study materials. Or e-mail your question to [customerservice@cpuiia.org](mailto:customerservice@cpuiia.org). Provide information about both the exam and the testing window in which you plan to take an exam.

### Exam Descriptions

Program	Number and Type of Questions	Time Limit
Introduction to Property and Casualty Insurance	50 multiple-choice items	120 minutes
Introduction to Claims	50 multiple-choice items	120 minutes
Introduction to Risk Management	40 multiple-choice items	90 minutes
Introduction to Underwriting	50 multiple-choice items	120 minutes
Essentials of Supervision (SM 18)	60 multiple-choice items	120 minutes
Supervisory Skills (SM 19)	60 multiple-choice items	120 minutes
Delivering Insurance Services (AIS 25)	60 multiple-choice items	120 minutes
Risk Management for Public Entities	75 multiple-choice items	120 minutes

### Continuing Education Credit

Inform the Institutes About CE Needs

**Important Note Regarding CE Filing:** the Institutes file CE credits according to the statutes of the state(s) in which you are licensed. It is your responsibility to understand the reporting requirements of your state(s). Failure to provide the Institutes with your current license information in accordance with the codes, policies, or regulations of your state(s) may result in CE credits not being filed. Any late filing fees and charges will be the sole responsibility of the student. To ensure prompt filing of your CE credits, log on to My Profile at [www.aicpcu.org](http://www.aicpcu.org) before sitting for an exam, click on the link for State Continuing Education Licenses, or call the Institutes, to update your record. When you have passed the identified exam, the Institutes will file the CE credit in all approved states in which you have current license information filed with us. See the Institutes' catalog for complete CE filing information.

### General Exam Information

EOR Exam Format	Exams are administered on computer and in paper and pen format. Computer-administered exams are preceded by an optional 30-minute tutorial and are followed by a brief survey. Paper and pen format is administered using test booklets and optical scan answer sheets. Both forms of EOR exams contain multiple-choice questions that offer four answer alternatives. One correct or best answer must be selected.
2009 Testing Window Dates	Computer exams are administered in two month intervals called testing windows. Those dates are January 15–March 15, April 15–June 15, July 15–September 15, October 15–December 15. Paper and pen exams administered in the workplace are available year-round.
Testing Centers	Computer exams are administered at Prometric Testing Centers and at Institutes Approved On-Site Testing Centers, usually an employer facility. <b>Prometric Testing Centers</b> —Prometric centers are located in more than 420 cities worldwide. Log on to <a href="http://www.prometric.com/AICPCU">www.prometric.com/AICPCU</a> to find a center. Examinees must arrive at Prometric Testing Centers at least 30 minutes before a scheduled appointment for check-in. <b>On-Site Testing Centers</b> —Visit the Institutes' Web site at <a href="http://www.aicpcu.org/register/ExamLocations.htm">www.aicpcu.org/register/ExamLocations.htm</a> to locate a center. Employers and educational organizations that want to establish an Institutes Approved On-Site Testing Center should contact the Assessments Department by fax at (610) 695-0881, by e-mail at <a href="mailto:assessments@cpuiia.org">assessments@cpuiia.org</a> , or by phone at (877) 463-0400.
Exam Fees	Registration fees vary by program and location of exam administration. See the information on page 3.
Registration Cancellations	Cancellation credits may apply if requested in a timely manner. See page 2 for cancellation and credit policies.
Retesting	Examinees may take the same exam a maximum of two times during a given testing window and a maximum of four times per calendar year. All exam retakes are subject to the full applicable exam registration fee.
Employer Paid Exam Fees	Employer paid fees are issued to the individual examinee's account. Fees are not transferable to another examinee. If you leave an employer before taking an exam, the Institutes will credit your former employer according to the policies on page 2.
Special Arrangements	The Institutes make every effort to assist students who have disabilities and need special exam arrangements. We do not charge for this service, but we do require documentation of disability. Submit a written request no later than the first day of the testing window for which you wish to register. To apply, e-mail <a href="mailto:assessments@cpuiia.org">assessments@cpuiia.org</a> or call (610) 644-2100, ext. 7313.

## Taking an Exams-on-Request Exam

Examinees must register with the Institutes before sitting for an EOR examination. Exam fees and the registration process for computer-administered and paper and pen EOR exams are different. Because of these differences, the two registration processes are described in separate sections of this registration booklet.

Registering for a Computer Exam	
How to Register	<p><b>Online</b>—www.aicpcu.org</p> <p><b>Phone</b>—(800) 644-2101 (Monday–Friday, 8 AM to 6 PM eastern time)</p> <p><b>Fax</b>—(610) 640-9576</p> <p><b>Mail</b>—720 Providence Rd., Suite 100, Malvern, PA 19355</p> <p><b>Registration Form (for mail-in or fax)</b>—see page 7.</p>
Payment	The Institutes accept American Express, Diners Club, Discover, MasterCard, and VISA. Mailed registrations also may be paid by check or money order. Fees are nonrefundable and nontransferable and must be paid in U.S. currency.
Identification	Register for an exam using your name exactly as it appears on the photo ID with signature that will be presented at the testing center.
Computer Exam Registration Deadlines	See the information starting on page 3 for exam fees and deadline dates. Note that a registration for a computer exam will not be accepted after the 10 <sup>th</sup> of the month in which the testing window closes.
Exam Registration Confirmation Notice	The Institutes send an electronic registration confirmation if an e-mail address is provided. Please read the confirmation completely. Check it for accuracy, and notify the Institutes immediately if there is an error. A separate confirmation notice is sent for each exam registration.

**Scheduling an Exam Appointment** To increase the chance of scheduling your preferred exam date and time, make your exam appointment as soon as possible. We also recommend scheduling the exam appointment early in the testing window in case the exam must be rescheduled or retaken.

Scheduling an Exam Appointment	
Appointment Waiting Period	<p><b>Online and Telephone Registration</b>—Appointments can be made immediately after registering.</p> <p><b>Fax Registration</b>—Wait two business days before scheduling an appointment.</p> <p><b>Mail Registration</b>—Wait two weeks to schedule an appointment.</p> <p>Or you may schedule an appointment immediately after receiving your Examination Registration Confirmation Notice.</p>
Prometric Testing Centers	To locate a Prometric Testing Center and schedule an appointment, log on to <a href="http://www.prometric.com/AICPCU">www.prometric.com/AICPCU</a> or call (877) 311-2525. Prometric's International phone numbers are listed on page 5.
On-Site Testing Centers	Contact the testing center directly for Scheduling policies and procedures. The list of approved on-site testing centers is available at <a href="http://www.aicpcu.org/register/Examlocations.htm">www.aicpcu.org/register/Examlocations.htm</a> .

Rescheduling an Exam Registration Within the Same Testing Window	
Prometric Testing Centers	To change an appointment to another date within the same testing window, go to Prometric's Web site, <a href="http://www.prometric.com/AICPCU">www.prometric.com/AICPCU</a> , or call (877) 311-2525 at least three days before the original appointment date. Otherwise, all fees will be forfeited if the exam is not taken.
On-Site Testing Centers	On-Site testing centers have their own policies and procedures for rescheduling. Contact the center directly.
No Rescheduling Fee	There is no fee for rescheduling an appointment within the same testing window if the above guidelines are followed.

Transferring an Exam Registration to the Next Testing Window	
Transferring to the Next Testing Window	Contact the Institutes at least three days before the scheduled exam to transfer to the next testing window and pay only a transfer fee (see below).
Exam Transfer Deadline	If you do not have a scheduled appointment, a request to transfer a registration is accepted up until the last day of the testing window for which you are registered. However, a transfer fee does apply.
Transfer Fees	On-Site Testing Centers—\$20 Prometric Testing Centers—\$80

**Exam Cancellation** Cancellation results in termination of a registration and the appointment. Both can be canceled in one call to the Institutes.

An examinee is eligible for a partial fee credit from the Institutes if both the registration and the exam appointment are canceled. Exam fee credits are explained below.

Exam Cancellation	
Canceling an Exam Registration	Go to the Institutes' Web site, <a href="http://www.aicpcu.org">www.aicpcu.org</a> , or call the Institutes at (800) 644-2101 three or more days before the scheduled appointment to cancel an exam registration. Doing so will also cancel your appointment at a Prometric Testing Center.
Canceling an Appointment at a Prometric Center	An appointment can be canceled up to three days before the test date by going to Prometric's Web site, <a href="http://www.prometric.com/AICPCU">www.prometric.com/AICPCU</a> or by calling (877) 311-2525. Canceling your appointment through Prometric does NOT cancel your exam registration. You also must cancel your registration with the Institutes (see above). Otherwise, no credit will be granted.
Canceling an Appointment at an On-Site Testing Center	Contact the testing center directly for cancellation policies and procedures. You must also cancel your registration with the Institutes (see above).
Cancellation Credit	No refund or credit is available for a student who cancels or does not sit for an examination at an Institutes Approved On-Site Testing Center. A \$20 credit is available for canceled exams scheduled at a Prometric Testing Center if the appointment is canceled at least three days prior to the appointment. A credit is good for two years from the date of issue and can be applied to the purchase of study material or to a future exam fee.
Cancellation Deadline	An exam registration for a Prometric Testing Center and the Prometric appointment must be canceled at least three days before the appointment date. If no appointment is scheduled, a registration for an exam at either a Prometric Testing Center or an on-site location can be canceled up to the last day of the testing window.

### Registering for Paper and Pen Exam

Steps in the Registration Process	<ol style="list-style-type: none"> <li><b>Secure an appropriate person to administer your exam.</b> A course leader would be an appropriate proctor. If you are studying independently, a manager, supervisor, or other experienced person, such as a training/education coordinator or the education chairperson of an insurance association, would be an appropriate choice. Friends, relatives, and nonsupervisory coworkers are not appropriate test administrators. Explain to the person you select as your test administrator that the Institutes provide no compensation for test administration, and with that person jointly review the Test Administrator instructions below. As an alternative, consider taking a computer exam at a Prometric Testing Center.</li> <li><b>Select an exam date.</b> Paper and pen exams can be administered at any time, not just during the Institutes' testing windows</li> <li><b>Complete the Registration Form on pages 7 and 8 in ink.</b> Note that exam fees differ according to the exam and where it is administered.</li> <li><b>Submit the registration form.</b> Give the completed Registration Form and exam fee to your test administrator so it can be mailed to the Institutes at least three weeks before your exam date.</li> </ol>
Payment See p. 4 for fees	The Institutes accept American Express, Diners Club, Discover, MasterCard, and VISA. Mailed registrations may also be paid by check or money order. Fees are nonrefundable and nontransferable and must be paid in U.S. currency.
Identification	Register for an exam using your name exactly as it appears on the photo ID with signature that you will present at the testing center.
Registration Deadline	Other than the requirement to submit the registration three weeks in advance of the exam date, there is no registration deadline or late fee associated with a paper and pen exam.
Exam Confirmation Notice	The Institutes will ship the examination materials approximately two weeks in advance of your test date. The Test Administrator will be requested to inform you when the exam materials arrive and to confirm the agreed upon test date.

### Students Who Do Not Sit for a Scheduled Paper and Pen Exam

Domestic Students	Students who do not take a scheduled paper and pen exam again must complete another registration form but will pay only a \$20 reregistration/transfer fee.
International Students	International students who do not sit for a paper and pen exam must register again and pay the full registration fee.

**Test Administrator Instructions for Paper and Pen Exams** A student registering for paper and pen exams must provide the following information to a prospective test administrator.

**Test Administrator:** The student has enlisted your aid as a test administrator for one of the Insurance Institute of America's Exams-on-Request. Please take the following steps to ensure that the Registration Form can be mailed to the Institutes at least three weeks before the exam date.

### Test Administrator Registration Responsibilities

Complete the Registration Forms	Collect a completed registration form from each examinee. Forms must be submitted with the appropriate exam fee. An original, previously purchased prepaid registration form will be accepted in lieu of the fee. Please make a photocopy of the student information side of all registrations for your records.
Sign Item 20 of the Registration Form	Please read, complete, and sign item 20. Be certain that your name and address appear in the shipping information block on the form.
Multiples Registrations	Submitting a group of registration forms requires shipping information only on the first form in the batch.
Submit the Registration Forms	At least three weeks before the exam date, send the registration forms to the Institutes. Also submit a cover letter that confirms the names on the registration forms. Mail registrations for paper and pen exams to Exams-on-Request, American Institute for CPCU, 720 Providence Road, Suite 100, Malvern, PA 19355-3433.

### Test Administration Responsibilities

Receive Exam Materials	Exams will be shipped to you by UPS. One exam will be sent for <b>each</b> person who submitted a registration form and the appropriate fee. <b>If you do not receive the exams shipment one week before the scheduled test date, call the Institutes at (610) 644-2100, ext 7301.</b>
Notify Examinee	Inform the examinee(s) when the examination(s) arrives and reconfirm the test date.
Proctor the Exam	<ul style="list-style-type: none"> <li>Serve as a test administrator without compensation from the Institutes.</li> <li>Receive and ensure the safety and integrity of the exam(s) and student answers, and ensure that neither the exam nor any part of it is photocopied or recorded in any way or discussed with anyone.</li> <li>Arrange for a quiet disruption-free area for administration of the examination.</li> <li>Administer the exam according to the instructions that accompany it.</li> <li>Carefully monitor the exam room during the testing session to ensure test security.</li> <li>Return the exam(s) to the Institutes immediately after administration.</li> </ul>

**EOR Exam Registration Fees for Computer-Administered and Paper and Pen Exams** Registration fees shown in this booklet are effective for examinations administered beginning January 15, 2009 for computer exams and January 1, 2009, for paper and pen exams. The international paper and pen exam registration fee applies to all examinations administered outside the United States and its possessions.

All EOR exams administered at Prometric Testing Centers worldwide are subject to the same registration fee schedule. The Prometric discount fee of \$125 applies to all registrations received on or before the first day of a testing window. The standard registration fee of \$190 applies to all registrations received after the first day of a window. Specific registration fees follow.

## EOR Exam Registration Fees for Computer-Administered and Paper and Pen Exams

Exam	EOR Course Title	On-Site Computer	Paper and Pen		Prometric	
			Domestic	International	*Discount	Standard
320	Introduction to Property and Casualty Insurance	\$35	\$60	\$110	\$125	\$190
330	Introduction to Claims	\$35	\$60	\$110	\$125	\$190
350	Introduction to Risk Management	\$35	\$60	\$110	\$125	\$190
360	Introduction to Underwriting	\$35	\$60	\$110	\$125	\$190
018	Essentials of Supervision (SM 18)	\$60	\$85	\$135	\$125	\$190
019	Supervisory Skills (SM 19)	\$60	\$85	\$135	\$125	\$190
025	Delivering Insurance Services (AIS 25)	\$80	\$105	\$155	\$125	\$190
352	Risk Management for Public Entities	\$60	\$85	\$135	\$125	\$190

\* Applies to all registrations received on or before the first day of a testing window. Fees must be paid in U.S. currency.

**Taking an Exam** The Institutes' goal is for every exam experience to be a positive one. To help ensure a smooth testing experience, you should note these exam policies and rules.

Exam Policies	
Identification	You must present valid, unexpired identification that contains BOTH a photograph and a signature. The name on your ID must exactly match your name as it appears on the examination confirmation notice. If, for example, your identification and confirmation notice do not match because you recently married, bring the original copy of your marriage license. Contact the Institutes at least one week prior to your appointment if you have any questions about proper ID. If you are denied admission to a testing center because of a question about your ID, immediately call the Institutes at (800) 644-2101 or (610) 644-2100. Do not leave the testing center without calling the Institutes.
Incorrect ID Number	If your ID number is incorrect and you made the appointment under that number, take the exam and call the Institutes immediately afterwards.
Inclement Weather	In the event of inclement weather, log on to <a href="http://www.aicpcu.org/testcenter">www.aicpcu.org/testcenter</a> to see whether your Prometric center is open. For exams at onsite centers, contact the company or the exam administrator to learn if the onsite center will be open. If the center is open and you do not take the exam, you will forfeit your fee.
No Visitors at Testing Centers	Visitors and companions are not permitted to wait in the testing center.

**Exam Rules** Examinees who do not agree to abide by the Institutes' Rules of Conduct for exam administration at the time of taking the exam will not be permitted to sit for an exam.

Exam Rules of Conduct	
Examinee Conduct/ Prohibited Actions	An IIA examinee is bound by the Disciplinary Rules, Procedures, and Penalties of the Insurance Institute of America. The Disciplinary Rules are available at <a href="http://www.aicpcu.org/doc/IIARules">www.aicpcu.org/doc/IIARules</a> . You will not be permitted to sit for an exam if you do not agree to abide by the Rules of Conduct statement at the beginning of exam administration.
Prohibited Items	Food and drink, jackets and hats, study materials, notes, dictionaries, and any form of electronic device, with the exception of an acceptable calculator (see below), are expressly prohibited. Lockers are available at Prometric Testing Centers for storing personal items.
Provided Items for Electronic Exams	Scratch paper and a pencil will be provided and will be collected at the end of the exam. Answers written on scratch paper, but not entered into the computer, are not graded. Ear plugs are available at Prometric Testing Centers.
Use of a Calculator	Any solar or battery powered calculator without alphanumeric keys or paper tape is permitted during an exam. Business/financial calculators that meet these criteria are permitted.
Problems During the Exam	Raise your hand if you encounter a problem during the exam. You may not communicate with anyone other than the test administrator.
Breaks	No scheduled breaks are provided. However, examinees may visit the restroom. When doing so, you will be required to sign out and then sign in again. You must return to your exam within five minutes, and the examination clock will continue to run.

Information about Computer-Administered Exams	
Demo Exam	For a hands-on demonstration of computer-delivered essay or objective exam questions, visit the Institutes' Web site at <a href="http://www.aicpcu.org">www.aicpcu.org</a> . Click on Examinations and download the exam demo software to your computer.
Required Skill Level	Taking an Institute exam on a computer does not require special computer skills. For objective exams, you can use a mouse or the keyboard to indicate an answer. To select your answer by using the keyboard, hold down the Alt key and then press the A, B, C, or D key.
Mark for Review	You can Mark for Review any questions that you want to come back to later. You can set the review screen to show several options, such as which questions were answered and marked or just those that remain unanswered.

**Helpful Information and Exam-Taking Tips** We know exam days can be stressful, so we offer you the following information and suggestions:

- Exams contain both stand-alone and case-application questions.
- There is no penalty for guessing, so answer all questions.
- Answers written on scratch paper provided by the testing center, but not entered into the computer, are not graded.
- Verify all questions are answered before exiting. An examination cannot be restarted once you exit it.
- Know exactly where your testing center is located and how long it will take to get there.

Exam Grading	
Computer Exams	Computer-administered EOR exams are graded as the exam is completed, unless grading is delayed (see below).
Paper and Pen Exams	Paper and pen grades usually are reported within one month of administration.
Grading Delays	Grading delays may occur when tests are based on new or revised study materials. This most often occurs during the January–March testing window for both computer and paper exams.
Exam Grades	Grades for most EOR exams are reported simply as “P” (Passing) or “N” (Nonpassing). For the AIS 25 exam, which is one of the requirements for the Associate in Insurance Services designation, grades are reported as “P” (Passing), “G” (Good), “E” (Excellent), or “N” (Nonpassing). Grades are final and are not subject to appeal. Numerical scores are not released.
Lost Exam	If an exam is lost in shipping or accidentally destroyed, no grade can be determined. The Institutes will arrange to re-administer the examination.

**International Exam Information** Unless otherwise specified, the Institutes' domestic exam policies and procedures apply to exams given outside the United States, its territories, and possessions.

International Exam information	
Computer Exam Administration Outside the U.S.	Computer exams, whether administered at a Prometric center or onsite, follow the same exam procedures and policies as those in the United States. International examinees are encouraged to use the Internet to schedule a Prometric appointment in order to decrease expenses, <a href="http://www.prometric.com/AICPCU">www.prometric.com/AICPCU</a> . Prometric's international telephone numbers are shown below.
How to Register	<p><b>Online</b> <a href="http://www.aicpcu.org">www.aicpcu.org</a></p> <p><b>Phone</b> (800) 644-2101 (Monday–Friday, 8 AM to 6 PM EST) 00 + 1 + 610 644 2100</p> <p><b>Fax</b> 00 + 1 + 610 640-9576</p> <p><b>Mail</b> 720 Providence Rd., Suite 100 Malvern, PA 19355-3433</p> <p><b>Registration Form (for mail-in or fax)</b>—see page 7</p>
Identification	Register for an exam using your name exactly as it appears on the photo ID with signature that will be presented at the testing center.
Payment See p. 4 for fees	The Institutes accept American Express, Diners Club, Discover, MasterCard, and VISA. Mailed registrations may also be paid by check or money order. Fees are nonrefundable and nontransferable and must be paid in U.S. currency.
Contacting the Institutes	Outside the U.S. and Canada, please call 00 + 1 + 610 644 2100 or e-mail <a href="mailto:customerservice@aicpcu.org">customerservice@aicpcu.org</a> .

International Prometric Telephone Numbers	
Region	Contact Center
North America—U.S. & Canada	1 877 311 2525
Latin America & Caribbean	1 443 751 4995
Europe	31 320 239 540
Middle East & North Africa	31 320 239 530
Africa	31 320 239 593
Japan	81 3 5541 4800
Korea	82 2 2116 8331
China	86 10 62799911
Hong Kong	60 3 7628 3333
Southeast Asia	60 3 7628 3333
India	91 124 414 7700
Australia & New Zealand	61 2 9640 5899

**Student Information Release Policy** The Institutes release student information in accordance with the following guidelines:

1. On request, we confirm whether a person holds an Institute designation or certificate, regardless of the person's request for confidentiality (see last paragraph below), because
  - It is in the public's interest to know whether someone holds an Institute credential.
  - It assists in enforcing the CPCU Code of Professional Ethics.
  - Lists of program completers are a matter of public record. See item #7.
2. We release pass/nonpass grade information to employers to facilitate their payments for Institute coursework and employee recognition.
3. We release student identification, contact, and exams-to-credit information to the CPCU Society so that it can
  - Offer Society membership to new CPCU designees and students.
  - Invite new CPCU designees to its Annual Meeting and Seminars.
  - Announce Society-chapter public classes and mentoring programs.
  - Encourage participation in the CPCU program.
4. We release students' names, addresses, and information on examinations passed to class providers and other educational partners so that they can promote public classes, monitor class pass ratios, or recognize educational achievement.

5. We do not release students' contact information to third parties for marketing purposes, except as noted.
6. Diplomas and certificates are the personal property of the students. Upon program completion, a diploma or certificate is sent directly to the student unless the student authorizes its release in writing to another party or entity for award ceremony or shipping purposes.
7. The Institutes publish the CPCU class list for the AICPCU Annual Conferment Ceremony and may publish annual IIA designation lists in the news media or for recognition purposes at other organization meetings.

The public may determine that someone holds an Institute designation or certificate by using the search program on our Web site: visit [www.aicpcu.org](http://www.aicpcu.org). Select Corporate Services and click on Search for Designation Holder.

If you would like to request confidentiality about all information (other than confirmation in the public's interest of holding a designation), call Customer Service at (800) 644-2101 or visit our Web site at [www.aicpcu.org](http://www.aicpcu.org) to select that option. Please note that restricting the release of the limited information above may impede employer payments and a new CPCU designee's receipt of announcements about CPCU Society membership and its Annual Meeting and Seminars.

## 2009 Registration Form for Exams-on-Request (EOR) Examinations

To register for an exam, please complete both sides of this form and return it to the Institutes as soon as possible. Do not use this form for non-EOR examinations. Either credit card information or the necessary fees (U.S. currency only) must accompany this Registration Form.

Web site: [www.aicpcu.org](http://www.aicpcu.org) • Telephone: (800) 644-2101 or (610) 644-2100 • E-mail: [customerservice@cpcuiia.org](mailto:customerservice@cpcuiia.org) • Fax for Computer Exams: (610) 640-9576 • Fax for Paper and Pen Exams: (610) 695-0881

1. Student ID number \_\_\_\_\_

We use your Social Security Number as your student identification number. It is an identifier commonly used by employers and other institutions. However, by law you are not required to disclose it, and we recognize there are concerns about privacy and identity theft. If you elect not to disclose or use your Social Security Number, we will assign a unique identification number to you.

To have a different identification number assigned to you, please call Customer Support at (800) 644-2101 or visit our Web site at [www.aicpcu.org](http://www.aicpcu.org). Click My Profile. Log in and select Request a New ID. OR:

Check this box and the Institutes will automatically assign you a unique ID number. You will receive an e-mail confirming the change.

Cautions about requesting new ID numbers:

- The Request a New ID function is not available to employees of some companies. Check with your employer before requesting a new ID number.
- Changing to a new ID number may delay employer reimbursement or incentive payments. Check with your employer before requesting a new ID number.
- Creating a new ID number may result in exam grades being improperly recorded in your different records. Always check your grades after changing your ID number.

2. **PRINT your full name exactly as shown on the photo ID that you will present at the testing center.** Your name must match, or you will be denied admission to the testing center.

\_\_\_\_\_  
Last

\_\_\_\_\_  
First MI

3. If you have previously registered for an examination under a different name, please print that name.

\_\_\_\_\_  
Last

\_\_\_\_\_  
First MI

4. Date of birth: Year \_\_\_\_\_ Month \_\_\_\_\_

5. Year entered the insurance business \_\_\_\_\_

6. Highest degree earned: (Check one.)

- |   |                                      |                                      |
|---|--------------------------------------|--------------------------------------|
| 1 <input type="checkbox"/> High school or GED | 2 <input type="checkbox"/> Associate | 3 <input type="checkbox"/> Bachelor  |
| 4 <input type="checkbox"/> Master             | 5 <input type="checkbox"/> Law       | 6 <input type="checkbox"/> Doctorate |
| 7 <input type="checkbox"/> None of the above  |                                      |                                      |

7. Business title \_\_\_\_\_

8. Job level: (Check one.)

- |  |  |
|--|--|
| 1 <input type="checkbox"/> Executive         | 2 <input type="checkbox"/> Senior management       |
| 3 <input type="checkbox"/> Middle management | 4 <input type="checkbox"/> Professional (non-mgmt) |
| 5 <input type="checkbox"/> Administrative    | 6 <input type="checkbox"/> Other                   |

9. Principal job function: (Check one.)

- |  |
|--|
| 1 <input type="checkbox"/> Commercial insurance underwriting           |
| 2 <input type="checkbox"/> Personal insurance underwriting             |
| 3 <input type="checkbox"/> Claims                                      |
| 4 <input type="checkbox"/> Risk management                             |
| 5 <input type="checkbox"/> Sales/Marketing/Account production          |
| 6 <input type="checkbox"/> Information systems OR Technology           |
| 7 <input type="checkbox"/> Human resources OR Training & development   |
| 8 <input type="checkbox"/> Customer service                            |
| 9 <input type="checkbox"/> Other insurance services (Please specify.)  |
| 10 <input type="checkbox"/> Other financial services (Please specify.) |

10. Employer's name \_\_\_\_\_

11. Branch office city/state (if applicable)

City: \_\_\_\_\_ State: \_\_\_\_\_

12. Employer organization type: (Check one.)

- |  |
|--|
| 1 <input type="checkbox"/> Insurance company   |
| 2 <input type="checkbox"/> Reinsurance company                                       |
| 3 <input type="checkbox"/> Agency  |
| 4 <input type="checkbox"/> Adjusting firm  |
| 5 <input type="checkbox"/> Brokerage firm  |
| 6 <input type="checkbox"/> Third party administrator (TPA)                           |
| 7 <input type="checkbox"/> Government/Public entity                                  |
| 8 <input type="checkbox"/> Risk management department in a noninsurance organization |
| 9 <input type="checkbox"/> Professional/Trade/Education organization                 |
| 10 <input type="checkbox"/> Other insurance services (Please specify.)               |
| 11 <input type="checkbox"/> Other financial services (Please specify.)               |

13. Daytime phone number

Area Code \_\_\_\_\_ No. \_\_\_\_\_ Extension \_\_\_\_\_

14. E-mail address (Please use appropriate uppercase/lowercase lettering.)

\_\_\_\_\_  
 If you would like to receive e-mail updates from the Institutes, check here.

15. Preferred mailing address:  Home address  Business address

Address: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/ZIP: \_\_\_\_\_

Province/Country: \_\_\_\_\_

Print your name: \_\_\_\_\_

Student ID number: \_\_\_\_\_

16. CE Credit (Check applicable license)  Producer  Adjuster  None  
License/NDN # \_\_\_\_\_  
Resident State \_\_\_\_\_

17. First-time registrants only—how did you hear about the Institutes? (Check one.)  
1  Employer HR, education, or training department  
2  Manager or supervisor  
3  Co-worker or business colleague  
4  Advertisement in industry publication  
5  Professional association  
6  Web search  
7  Conference or trade show  
8  Other (Please specify.) \_\_\_\_\_

18. Exam registration—Indicate the exam(s) for which you are registering.  
320-32  Introduction to Property and Casualty Insurance  
330-33  Introduction to Claims  
350-50  Introduction to Risk Management  
360-36  Introduction to Underwriting  
018-34  Essentials of Supervision (SM 18)  
019-34  Supervisory Skills (SM 19)  
025-25  Delivering Insurance Services (AIS 25)  
352-52  Risk Management for Public Entities

If re-registering for an exam that was approved for transfer to the next testing window, pay \$20 for an on-site computer exam, pay \$80 for a Prometric exam, or pay \$20 for a domestic paper and pen exam. Re-registration is not available for international paper and pen exams.

19. **Computer-Delivered Exam Registration Only**—Registrations must be received no later than the 10th of the month in which the testing window closes.  
a. Indicate the testing window for which you are registering  
 January 15–March 15  
 April 15–June 15  
 July 15–September 15  
 October 15–December 15

b. Computer Test Location:  On-Site  Prometric  
c. If on-site location, Center Code from Institutes' Web site is *required*:  
\_\_\_\_\_

20. **Paper and Pen Exam Registration Only**  
a. Exam Location:  Domestic  International  
b. Indicate the exam date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
c. Administrator must complete this section.

I accept the role and responsibilities of an exam administrator and agree to the conditions set forth by the Institutes.

Name—please print: \_\_\_\_\_  
Signature: \_\_\_\_\_  
Relationship to student: \_\_\_\_\_  
Daytime phone: \_\_\_\_\_ Ext. \_\_\_\_\_  
E-Mail address: \_\_\_\_\_

Street address to which exam(s) should be sent—No PO Box

Company name: \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/ZIP: \_\_\_\_\_

Province/Country: \_\_\_\_\_

21. Preparation method: (Check one.)  
1  Group learning with a course leader  
2  Group learning without a course leader  
3  Independent learning  
4  Relying solely on experience and knowledge  
5  Relying on non-Institute study materials  
6  *Institutes Online* learning

22. **The Institutes' Student Information Release Policy**  
The Institutes respect students' privacy rights and are committed to safeguarding each student's personal information. Please see the Institutes' Student Information Release Policy on page 6.

23. Ethics: An IIA examinee is bound by the Disciplinary Rules, Procedures, and Penalties for the Insurance Institute of America, which are found at <http://www.aicpcu.org/doc/IIARules.htm>.

24. Payment: (See page 4 for Exam Fee Chart.)

Exam Fees	\$
Re-registration Fee	\$
Credit Available	-\$
Total Remittance	\$

If paying by check, please make payable to: American Institute for CPCU

For corporate invoicing, please provide the billable account code here:

Account Code: \_\_\_\_\_

**Return this form with all necessary fees to:**  
American Institute for CPCU  
720 Providence Road  
Suite 100  
Malvern, PA 19355-3433  
FAX (610) 640-9576

Credit Card Number: \_\_\_\_\_  
(American Express, Diners Club, Discover, MasterCard, and VISA cards are accepted.)

Expiration date: \_\_\_\_\_

Signature: \_\_\_\_\_

<b>For accounting use only</b>	Date Received _____
Amount _____	Account # _____