

Many factors must be considered to develop an appropriate professional development plan. They include industry background and experience, education, previous professional development activities, and organizational or departmental needs; entry points and courses of study will vary. Visit [www.TheInstitutes.org](http://www.TheInstitutes.org) to download a blank planner.

## My Professional Development Planner

|           |  |   |
|-----------|--|---|
| PHASE III | <p><b>Phase III</b>—continuing professional development—should last throughout an individual's insurance career and often includes specialist course work. Individuals may choose to pursue other Institutes associate designations, CPCU, online learning courses, and company-specific internal training programs.</p>   | <div style="border: 1px solid #f4a460; width: 100%; height: 40px; margin-bottom: 5px;"></div> <div style="border: 1px solid #f4a460; width: 80%; height: 40px; margin-bottom: 5px; margin-left: 20px;"></div> <div style="border: 1px solid #f4a460; width: 60%; height: 40px; margin-bottom: 5px; margin-left: 40px;"></div> <div style="border: 1px solid #f4a460; width: 40%; height: 40px; margin-bottom: 5px; margin-left: 60px;"></div>   |
| PHASE II  | <p><b>Phase II</b> starts in the second year of employment and may take one of two basic approaches—or a combination of the two—depending on the variables mentioned above.</p> <p><b>Generalist (G).</b> Depending on specific organizational or individual needs, INS or CPCU study provides a broad range of technical insurance knowledge. While CPCU is more advanced, The Institutes find that Individuals who begin CPCU study early in their careers are more successful in completing the program.</p> <p><b>Specialist (S).</b> Individuals focus on specialized technical knowledge, which can be gained through one of The Institutes' associate designations, online learning courses, and company-specific internal training programs.</p> | <div style="border: 1px solid #66b3e0; width: 100%; height: 40px; margin-bottom: 5px;"></div> <div style="border: 1px solid #66b3e0; width: 80%; height: 40px; margin-bottom: 5px; margin-left: 20px;"></div> <div style="border: 1px solid #66b3e0; width: 60%; height: 40px; margin-bottom: 5px; margin-left: 40px;"></div> <div style="border: 1px solid #66b3e0; width: 40%; height: 40px; margin-bottom: 5px; margin-left: 60px;"></div> <div style="border: 1px solid #66b3e0; width: 20%; height: 40px; margin-bottom: 5px; margin-left: 80px;"></div> |
| PHASE I   | <p><b>Phase I</b> corresponds roughly to the first year in the property-casualty insurance industry. These courses provide a solid foundation for successful career-long professional development.</p>   | <div style="border: 1px solid #90c0a0; width: 100%; height: 40px; margin-bottom: 5px;"></div> <div style="border: 1px solid #90c0a0; width: 80%; height: 40px; margin-bottom: 5px; margin-left: 20px;"></div> <div style="border: 1px solid #90c0a0; width: 60%; height: 40px; margin-bottom: 5px; margin-left: 40px;"></div> <div style="border: 1px solid #90c0a0; width: 40%; height: 40px; margin-bottom: 5px; margin-left: 60px;"></div> <div style="border: 1px solid #90c0a0; width: 20%; height: 40px; margin-bottom: 5px; margin-left: 80px;"></div> |

**Name:** \_\_\_\_\_



Many factors must be considered to develop an appropriate professional development plan. They include industry background and experience, education, previous professional development activities, and organizational or departmental needs; entry points and courses of study will vary. Visit [www.TheInstitutes.org](http://www.TheInstitutes.org) to download a blank planner.

## My Professional Development Planner

|           |  |   |
|-----------|--|---|
| PHASE III | <p><b>Phase III</b>—continuing professional development—should last throughout an individual's insurance career and often includes specialist course work. Individuals may choose to pursue other Institutes associate designations, CPCU, online learning courses, and company-specific internal training programs.</p>   | <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Company-Specific Training</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">CPCU</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Associate in:</div> <div style="border: 1px solid #ccc; padding: 5px;">Online Courses</div>   |
| PHASE II  | <p><b>Phase II</b> starts in the second year of employment and may take one of two basic approaches—or a combination of the two—depending on the variables mentioned above.</p> <p><b>Generalist (G).</b> Depending on specific organizational or individual needs, INS or CPCU study provides a broad range of technical insurance knowledge. While CPCU is more advanced, The Institutes find that Individuals who begin CPCU study early in their careers are more successful in completing the program.</p> <p><b>Specialist (S).</b> Individuals focus on specialized technical knowledge, which can be gained through one of The Institutes' associate designations, online learning courses, and company-specific internal training programs.</p> | <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Company-Specific Training (S)</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">CPCU (G)</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Associate in (S):</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Online Courses (S)</div> <div style="border: 1px solid #ccc; padding: 5px;">Associate in General Insurance (G)</div>                             |
| PHASE I   | <p><b>Phase I</b> corresponds roughly to the first year in the property-casualty insurance industry. These courses provide a solid foundation for successful career-long professional development.</p>   | <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Ethical Guidelines for Insurance Professionals</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Introduction to:</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Company-Specific Training</div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Online Fundamentals Courses</div> <div style="border: 1px solid #ccc; padding: 5px;">Insurance Essentials</div> |

**Name:** \_\_\_\_\_

