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.

Courses and Segmented Topics

**AAI 81: Foundations of Insurance Production**
- C—Commercial Property Insurance: Commercial Property Insurance, Business Income and Extra Expense Insurance, and Commercial Inland and Ocean Marine Insurance

**AAI 82: Multiple-Lines Insurance Production**
- C—Specialized Insurance and Bonds: Specialty Insurance, Commercial Excess and Umbrella Liability Insurance, and Surety Bonds

**AAI 83: Agency Operations and Sales Management**
- A—Principles of Agency Management: Agency Formation and Environment, Organizational Management, Agency Sales Management, and Personal Production Plans

**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).

**Ethics Requirement**
Ethical behavior is crucial to preserving the trust on which insurance transactions are based and also the public’s trust in our industry. That’s why completing the free online Ethical Guidelines for Insurance Professionals is required for all associate designation programs. Log on to www.TheInstitutes.org/ethics for information and sign up for free.
**PHASE I**

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

<table>
<thead>
<tr>
<th>Insurance Essentials</th>
<th>Online Learning Fundamentals Courses</th>
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</thead>
<tbody>
<tr>
<td>Company-Specific Training:</td>
<td>Introduction to:</td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>Associate in General Insurance <em>(G)</em></th>
<th>Online Learning <em>(S)</em>:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accredited Adviser in Insurance</td>
<td>CPCU <em>(G)</em></td>
</tr>
<tr>
<td>Company-Specific Training <em>(S)</em></td>
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</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>Online Learning</th>
<th>Associate in:</th>
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<tbody>
<tr>
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