

# Self-Inventory for Prospective Institutes Students

<b>Name</b>	<b>Date</b>
<b>Agency/Company/Firm</b>	<b>Job Title</b>
<b>Street Address</b>	<b>Email Address</b>
<b>City/State/Zip</b>	<b>Daytime Telephone</b>

The above address is my  Business Address  Home Address

1. Have you previewed our list of programs/courses on our website [TheInstitutes.org](http://TheInstitutes.org)? Please indicate the following area of study that interests you (e.g. general insurance; claims, etc.)

\_\_\_\_\_

2. I have worked in property-casualty insurance OR have worked in a job related to insurance for

1 year or less  3-4 years  8 or more yrs

1-2 years  5-8 years  N/A

3. The state-issued license(s) I now hold are

Adjuster

Agent (property and/or casualty)

Agent (life and/or health)

Some exams have been filed for state CE credit in some states. Please check the list at

[TheInstitutes.org/Students/GradesCECredit.htm](http://TheInstitutes.org/Students/GradesCECredit.htm)

4. My job duties are mostly related to \_\_\_\_\_

\_\_\_\_\_  
(claims; underwriting; marketing; etc.)

5. My work experience has mostly been in the area of

\_\_\_\_\_  
(personal ins; commercial ins; risk mgmt; etc.)

6. My current job title is \_\_\_\_\_

\_\_\_\_\_

7. The highest education diploma or degree I now hold is

High school diploma  Law degree

H.S. Equivalency  Master's degree

Associate degree  Doctoral degree

Bachelor's degree  None

8. I last attended school as a full-time student or completed a college course, job-related course, a course to prepare for an Institutes, CLU, CPA or similar exam.

What course of study did you complete?

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When were you last involved in a course?

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9. On a scale from 1 to 5, my motivation for personal growth and professional development is  
(1 = lowest and 5 = highest)

1      2      3      4      5

10. I am willing to spend \_\_\_\_\_ hours per week in personal study and preparation

11. If you take an Institutes course, do you plan to take the exam?

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12. On a scale from 1 to 5, how good is your reading speed and comprehension of college-level text material?

1      2      3      4      5

13. I have purchased my study materials

\_\_\_\_ Yes      \_\_\_\_ No

I have started my study

\_\_\_\_ Yes      \_\_\_\_ No

The course I started is

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14. Do you want to be contacted by an Institutes student advisor?

\_\_\_\_ Yes      \_\_\_\_ No

For an objective review of this Self-Inventory Form by a student advisor, with a recommendation that might provide your best educational starting point, send this completed form to:

**The Institutes**

Educational Counseling  
720 Providence Road, Suite 100  
Malvern, PA 19355

**Fax:** 610-640-9576

**Email:** [Advising@TheInstitutes.org](mailto:Advising@TheInstitutes.org)