# Self-Inventory for Prospective Institutes Students

<table>
<thead>
<tr>
<th>Name</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency/Company/Firm</td>
<td>Job Title</td>
</tr>
<tr>
<td>Street Address</td>
<td>Email Address</td>
</tr>
<tr>
<td>City/State/Zip</td>
<td>Daytime Telephone</td>
</tr>
</tbody>
</table>

The above address is my ______ Business Address ______ Home Address

1. Have you previewed our list of programs/courses on our website 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

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 |

TheInstitutes.org
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?
_____________________________________________

When were you last involved in a course?
_____________________________________________

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?

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
_____________________________________________

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

TheInstitutes.org