# Self-Inventory for Prospective CPCU and IIA 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>
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The above address is my   Business Address   Home Address

1. Have you previewed our list of programs/courses on our Web site [www.TheInstitutes.org](http://www.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 □ Not Applicable

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 CE credit in some states. Please check the list at [http://www.aicpcu.org/Students/GradesCECredit.htm](http://www.aicpcu.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 IIA, CPCU, 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 a CPCU or IIA 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 a CPCU/IIA 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: [customerservice@TheInstitutes.org](mailto:customerservice@TheInstitutes.org)

[www.TheInstitutes.org](http://www.TheInstitutes.org)