# Self-Inventory for Prospective CPCU and IIA Students

| Name | Date |
|---|---|
| Agency/Company/Firm | Job Title |
| Street Address | Email Address |
| City/State/Zip | Daytime Telephone |

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? 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

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:

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Educational Counseling
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Malvern, PA 19355

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Email: customerservice@TheInstitutes.org

www.TheInstitutes.org