

NAIC Education & Training Course Catalog


2024 EDITION




These symbols indicate:

NAIC Insurance Regulator Professional Designation course

 **APIR**
Associate Professional in Insurance Regulation

 **PIR**
Professional in Insurance Regulation

 **SPIR**
Senior Professional in Insurance Regulation

 **IPIR**
Investment Professional in Insurance Regulation

Eligibility for Designation Renewal Credit (DRC)



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NAIC Education & Training Course Catalog

The NAIC Education and Training department offers training and professional development programs to NAIC members and other interested parties at all levels of their careers and expertise.

The NAIC introduced the Insurance Regulator Professional Designation Program in 2006. The program provides a structured professional development path based on the NAIC curriculum.

Please note dates, locations, registration fees, and continuing education credits are subject to change.

For the latest information, please **visit naic.org**

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ACCOUNTING AND REPORTING

Annual Statement Investment Schedules

This course is designed to assist insurance industry professionals in determining correct reporting categories for various types of invested assets. Accounting issues for the various investments are also presented and discussed.

Online, Self-Paced

Offered monthly beginning in October



Credit Type: DRC

Health Annual Statement Preparation

This course provides practical guidance in the preparation of this year's health statement and any current accounting changes. The topics covered include Assets, Liabilities, Statement of Revenue, Cash Flow, Analysis of Operations, and a basic overview of investment reporting.

Online, Self-Paced

Offered monthly beginning in September



Credit Type: DRC

Introduction to Statutory Accounting Principles

This course is designed for regulators who are new to statutory accounting and insurance companies' guidelines concerning financial statement preparation. Enrollees generally have less than two years' experience applying statutory accounting principles. This two-week online course serves as a foundational introduction to the NAIC's SAP series of learning coursework.

Online, Self-Paced

Offered Weekly



Credit Type: DRC

P&C Annual Statement Preparation

This course, designed for those with one to five years of insurance experience, gives the most up-to-date statutory accounting and reporting requirements for Property & Casualty insurers. Topics covered include balance sheet, income statement, and loss reserves reporting along with the supporting schedules and exhibits.

Online, Self-Paced

Offered monthly beginning in September

Credit Type: DRC



SAP Webinar (A) Updates & Hot Topics

This webinar presents recent updates and information for Statutory Accounting Principles. This webinar assists learners in identifying new and revised statutory accounting guidance and covers hot topics being considered by the Statutory Accounting Principles (E) Working Group.

Webinar

Offered in June and December

Credit Type: CPE, DRC



SAP Webinar (B) Reporting Updates

This webinar presents recent updates and information for reporting Statutory Accounting Principles. The webinar will help learners identify adopted annual reporting changes, discuss the Notes to Financial Statement proposed changes and the related SSAPs and cover annual statement changes that have been exposed for comment.

Webinar

Offered in September

Credit Type: CPE, DRC



Schedule P

This course provides regulators with a foundation for analyzing the effectiveness of a company's reserve determinations. It also provides insurance company management with information allowing them to monitor the company's loss ratios, performance compared to peer companies, and the experience of its ceded reinsurance.

Online, Self-Paced

Offered weekly starting in September

Credit Type: DRC



GENERAL INSURANCE

An Introduction to the Insurance Industry

This text-based course is designed to provide the fundamentals of insurance for those new to the insurance industry. The course provides a working knowledge of insurance, including its regulation and marketing. The course also offers a systems-oriented view of how insurance industry professionals and regulators work together to protect and meet the needs of consumers.

Online, Self-Paced

Offered Weekly

Credit Type: CE

GENERAL REGULATORY COMPLIANCE

Ethical Considerations of Insurance Companies

Circumstances sometimes arise that present dilemmas insurance industry professionals must confront and resolve while keeping their personal integrity intact. This course is designed for you to become familiar with general codes of conduct, guidelines, policies, and laws so that personal integrity is kept above board and compliant with established ethical standards.

Online, Self-Paced

Offered Weekly

Credit Type: DRC



Ethical Considerations of State Insurance Regulators

Circumstances sometimes arise that present dilemmas state insurance regulators must confront and resolve while keeping their personal integrity intact. This course is designed for you to become familiar with general codes of conduct, guidelines, policies and laws so that personal integrity is kept above board and compliant with established ethical standards.

Online, Self-Paced

Offered Weekly

Credit Type: DRC



The Essential Learnings of the Surplus Lines Market

This course will build your knowledge of the surplus lines market and provide you with an understanding of how it operates. You will learn how and when brokers utilize the surplus lines market. The week-long course provides information including an overview of the surplus lines market, the market's framework and distribution system, Lloyd's of London, and state and federal regulation.

Online, Self-Paced
Offered in December
Credit Type: DRC, PIR



GOVERNMENT/POLICY/ INTERNATIONAL

Mental Health Parity

This course provides regulators an in-depth overview of mental health parity and topics that are being discussed in this area.

Online, Self-Paced
Offered in March and September
Credit Type: DRC



Emerging International Issues: Protection Gaps

Protection gaps are a global challenge, especially in the wake of climate change. They occur when total economic losses are more than total insured losses after a loss. During this webinar, we will discuss the work being done around the world to address and close protections gaps and the challenges that still remain.

Webinar
Offered in May
Credit Type: CPE, DRC



Understanding the Federal Legislative & Regulatory Process

This course is designed to help regulators get a basic understanding of the United States Congress and how laws are made. This course also provides information regarding strategies used to influence the legislative and regulatory process as they relate to insurance as well as statutes the insurance industry must abide by and the role the NAIC plays in insurance regulation.

Online, Self-Paced
Offered Monthly
Credit Type: DRC, PIR



HUMAN RESOURCES/LEADERSHIP/ PROFESSIONAL SKILLS

7 Professional Writing Secrets— to Write Better, Faster, Easier

Do you struggle to write reports, emails, proposals? Learn to write docs 50% faster—and save 1-2 hours/week with these 7 writing tricks used by professionals, from award-winning national writing expert Paula Peters. In this fast-paced, interactive seminar, you will learn to write better, faster, easier—for any document. Plus, you'll learn how people read content today (hint: it's different from 5 years ago!). Paula has taught executives and officers from U.S. Strategic Command, Capitol Hill, Broadway, the Pentagon—and will show you the “insider” tricks of the trade.

Online, Self-Paced
Offered Monthly
Credit Type: DRC



Foundations of Diversity, Equity, and Inclusion for Regulators

You may be wondering, “Why is diversity, equity, and inclusion (DE&I) important to me?” Studies have shown that an understanding of DE&I concepts create an opportunity to:

- Eradicate prejudice
- Enhance levels of creativity and innovation
- Improve profitability
- Boost employee engagement and retention
- Improve company reputation
- Enhance brand recognition

Online, Self-Paced
Offered Weekly
Credit Type: DRC



Introduction to Critical Thinking

This course is designed to provide a comprehensive definition of critical thinking. The units of study incorporate critical thinking, inquiry, and logical fallacies.

Online, Self-Paced
Offered Weekly
Credit Type: DRC



Practical Manager Program

The Practical Manager Program is an interactive workshop designed specifically for managers, supervisors, and executive-level leaders within state insurance departments. This NAIC Insurance Regulator Professional Designation Program, Senior Professional in Insurance Regulation (SPIR) level course uses real world examples and engaging, up-to-date content to develop effective leaders for state departments of insurance. Modules are delivered in person within a classroom-style setting.

Live, In-Person
Offered On Demand
Credit Type: CPE, DRC, SPIR



INVESTMENTS

Basic Derivatives

This course is a primer on fundamental concepts regulators can draw upon when reviewing derivative instruments. The course is designed to equip regulators to explain derivatives and how they are used in investment portfolios, as well as understand the different types of derivative products found on an insurer's financial statement.

Online, Self-Paced
Offered Monthly Starting in July
Credit Type: DRC



Basics of Investing

This course lays the foundation to understand fundamental investment concepts regulators draw upon when reviewing insurance company portfolios. It focuses on the finer points of investment principles, such as the primary goals of investing and investment returns.

Online, Self-Paced
Offered in May
Credit Type: DRC, PIR
IPIR Prerequisite



Capital Markets Quarterly Updates

The NAIC's Capital Markets Bureau holds webinar updates on a quarterly basis. The Capital Markets Bureau is comprised of a team of experienced financial services professionals who provide support to state insurance departments in terms of capital markets research and insurance company investment activities.

The quarterly webinars include presentations on recent trends and developments in the financial markets. After that,

presenters engage with learners with a question-and-answer session regarding the presentation or other investment related topics of interest.

The objective is to give learners the benefit of insight and experience from experts following capital markets, especially as they relate to insurance companies and insurance regulation.

Webinar
Offered Quarterly
Credit Type: CPE, DRC



Corporate Securities

During the course, you will participate in a variety of activities such as lectures, special report article reviews, skill builder exercises and quizzes.

Online, Self-Paced
Offered in March
Credit Type: DRC, IPIR



Derivatives

This course builds off material covered during the Basic Derivatives online course. This course takes an in-depth look at derivative definitions, practical uses of derivatives for insurers and look at common risks of derivatives for insurers.

Online, Self-Paced
Offered in July
Credit Type: DRC, IPIR



How to Analyze Insurer Investment Portfolios

This course is designed to improve analytical skills and walk regulators through the tools available to financial analysts when reviewing an insurers investment portfolio. This course provides updates on investment products and covers trends relevant to insurer portfolios.

Online, Self-Paced

Offered in October

Credit Type: DRC, PIR

IPIR Prerequisite



Municipal Securities

This course provides an overview of Municipal Securities, discusses financial guarantors and how they are related to the municipal bond market, covers municipal default and bankruptcy, and looks at fiscal challenges currently facing state and local governments.

Online, Self-Paced

Offered in November

Credit Type: DRC, IPIR



Other Long-Term Invested Assets

This course introduces important concepts, terms, and processes associated with other long-term invested assets. Throughout the course, you will cover various aspects, starting with a background overview.

You will delve into growth, components, mix, and regulatory capital requirements. Additionally, this course explores regulatory and investor concerns surrounding these assets. Major components and other regulatory oversight and strategies will be thoroughly discussed to provide a comprehensive understanding. You will also examine the

Financial Analysis Handbook and the Financial Condition Examiners Handbook, shedding light on their relevance to these assets.

Online, Self-Paced

Offered in April

Credit Type: DRC, IPIR



Securities Lending and Repurchase Agreements

This course provides a variety of experiences for learners. This course will cover securities lending, insurer exposure to securities lending, repurchase agreements and touch on recent trends.

Online, Self-Paced

Offered in December

Credit Type: DRC

IPIR Prerequisite



U.S. Government Securities

This course provides an overview of Government Securities and will examine risks currently facing this class of assets.

U.S. Government Securities include U.S. Treasuries, U.S. Agency Debt, and securities issued by Government Sponsored Entities, such as Fannie Mae, Freddie Mac, and the Federal Home Loan Banks.

Online, Self-Paced

Offered in September

Credit Type: DRC, IPIR



INSURANCE PRODUCTS/REGULATION

Regulation of Insurance Products

This course, along with the Product Filing Review Handbook, is intended to assist state and territory insurance regulators in maintaining uniformity and consistency in regulating and enforcing state laws related to the sale of insurance products.

The Product Filing Review Handbook is an easy reference source to help regulators provide speed to market for insurers while maintaining a high level of consumer protection. The Handbook is available from NAIC Publications through StateNet (login required).

Online, Self-Paced
Offered Monthly
Credit Type: APIR



LEGAL

Core Legal

This course is designed for attorneys and insurance professionals, who are new to state insurance regulation become familiar with the various laws that govern the insurance industry.

Online, Self-Paced
Offered Weekly
Credit Type: DRC, PIR



MARKET CONDUCT REGULATION AND COMPLIANCE

Basic Fraud Investigations

This course is designed to assist state and territory insurance officials and industry professionals in detecting, monitoring, and investigating insurance fraud, both by and against consumers. This course covers basic terms and concepts, how to use available fraud databases provided by the NAIC and other online search tools in investigations, and how to investigate agent and consumer fraud.

Online, Self-Paced
Offered Weekly
Credit Type: DRC, PIR



Consumer Assistance

This introductory course is designed to equip insurance regulators with an understanding of the consumer assistance function in an insurance department.

Online, Self-Paced
Offered Weekly
Credit Type: DRC, PIR



Foundations of Insurance Regulation

This course is designed to provide regulators an introduction to a broad array of regulatory disciplines. This two-week online course is the perfect foundation on which to build a repertoire of regulatory skills and concepts taught in other NAIC courses.

Online, Self-Paced
Offered Weekly
Credit Type: APIR



Market Analysis Techniques

This course will provide a detailed focus on the analysis of complaint data and complaint ratios, an in-depth look at the company market analysis profiles, and an explanation of the relevance of financial data to market analysis. You will learn what regulatory action should be initiated in response to identified problems at a company. You will also gain hands-on experience navigating, extracting, and analyzing data from NAIC databases, as well as experience running reports from the Market Information Systems (MIS).

Online, Self-Paced
Offered Monthly
Credit Type: DRC, PIR



Market Conduct Annual Statement (MCAS) Training

As you know, the Market Conduct Annual Statement (MCAS) is an important part of insurance regulation. MCAS data is used by all participating states to review market activity of the insurance marketplace in a consistent manner. The tutorials within this course are intended to provide a solid foundation to efficiently access, navigate, review and update information within the MCAS system.

Webinar
Multiple sessions offered March-April
Credit Type: CE

Market Conduct Examinations

This three-week online course will cover all aspects of the Market Conduct Examination. You will learn how to use the Market Regulation Handbook when conducting an exam, determine logistical and administrative requirements for an efficient exam, and identify required elements of a Market Conduct Examination Report. The course will also cover how

to successfully close a Market Conduct Examination and ensure a confident mindset throughout the process.



Online, Self-Paced
Offered Weekly
Credit Type: DRC, PIR



Producer Licensing

This one-week online course takes you from the beginning of producer licensing, through the integration of current policies and processes, to initiatives that are on the horizon. It is an excellent learning opportunity for licensing analysts, consumer service analysts, market conduct examiners, fraud investigators, and anyone interested in understanding producer licensing, policies, and future-shaping technology.



Online, Self-Paced
Offered Weekly
Credit Type: DRC, PIR



RESEARCH/CENTER FOR INSURANCE POLICY AND RESEARCH (CIPR)

Introduction to Catastrophe Modeling

This introductory-level course is designed to provide a broad, foundational understanding of catastrophe model theory. It serves as a starting point in your catastrophe model learning journey.

The principles and concepts of this course are designed for regulators with no prior experience in the complex field of catastrophe modeling. However, it is beneficial to have a basic understanding of insurance principles and regulatory frameworks before enrolling.

This course focuses solely on property and casualty lines of business.

Please note: This course uses introductory terminology which may differ from verbiage used in specific professions and industries.

Online, Self-Paced
Offered Weekly
Credit Type: DRC



SOLVENCY REGULATION AND COMPLIANCE

Accreditation Update

Plan to attend this annual webinar to learn about the latest updates to the NAIC Accreditation Program.

Webinar

Offered in January

Credit Type: CPE, DRC



Annual Industry and Risk Alert Updates

This webinar provides an overview of yearly results, trends, developments, and current/prospective risks related to each line of business. Also covered are analytical procedures analysts can use in identifying insurers' risk related to industry results and trends.

Webinar

Offered in June

Credit Type: CPE, DRC



Basic Reinsurance

This course provides information on the fundamentals of reinsurance, reinsurance contracts, and accounting for reinsurance. In this course, you will explore the role reinsurance plays in the insurance market, why companies purchase reinsurance, and how reinsurance is regulated.

Online, Self-Paced

Offered in June and October

Credit Type: DRC, PIR



Climate Change and Risk-Focused Examinations

This intermediate-level course provides an overview of the types of severe weather and climate change risks insurance companies face. It is designed for mid- and senior-level financial examiners in state and territory insurance departments.

The course explores how solvency risks can arise in an insurer's underwriting, investment, and reinsurance practices as a result of climate changes' impact to the insurance industry. Additionally, the course covers the effects on solvency when these three risk areas overlap.

Online, Self-Paced

Offered Weekly

Credit Type: DRC



Effective Coaching Techniques for Financial Regulators

This course is designed for those in a financial regulatory supervisory role and offers insight into the importance of coaching in the workplace and those points to consider when giving or receiving feedback. This course also provides examples of effective supervisory review using both financial analysis and financial examination-based situations.

Online, Self-Paced

Offered Weekly

Credit Type: DRC



Financial Analysis

The course is designed to provide new analysts with techniques for effective financial analysis, methods that employ solvency monitoring tools, and the guidance outlined in the Financial Analysis Handbook. Special emphasis is placed on the risk-focused approach to financial analysis.

While the course is recommended for analysts with one to two years' experience, it also may be a good refresher

for more experienced analysts and may provide ideas for possible areas of improvement.

Online, Self-Paced
Offered Weekly
Credit Type: DRC, PIR



Financial Analysis Solvency Tools Updates

This webinar is designed to update financial analysts on the solvency tools available for annual 2023 filing reviews. This session will also include a live demo of the New Financial Profile and cover changes to solvency handbooks.

Webinar
Offered in January
Credit Type: CPE, DRC



Financial Condition Examiners Handbook Updates

This webinar presents updates to the Financial Condition Examiners Handbook as well as any developing financial exam issues.

Webinar
Offered in February
Credit Type: CPE, DRC



Group Capital Calculation Training for Industry

This course is designed to help you understand the basic construct and methodology of the NAIC's Group Capital Calculation.

Online, Self-Paced
Offered Monthly
Credit Type: DRC



Group Capital Calculation Training for Regulators

This course was designed to help you understand the basic construct and methodology of the NAIC's Group Capital Calculation and will assist you in reviewing the Group Capital Calculation for your state.

Online, Self-Paced
Offered Monthly
Credit Type: CPE, DRC



Introduction to Financial Regulation

This introductory course is designed for those who have been in financial regulation two years or less. Throughout this course, you will gain an understanding of several key areas of financial regulation including the tools available to examiners and analysts, the financial analysis process, and the risk-focused examination process.

Online, Self-Paced
Offered Weekly
Credit Type: APIR
IPIR Prerequisite



Introduction to Financial Regulation for Non-Financial Regulators

This course is designed to provide foundational knowledge and skills for regulators that do not work directly with financial solvency regulation.

Online, Self-Paced
Offered Weekly
Credit Type: APIR



New Financial Regulator

This training is designed for analysts and examiners with less than 3 years' experience. The course covers Financial Analysis and Exam Best Practices including coordination between the two, and wraps up with a Solvency Monitoring Case Study.

Live, In-Person

Offered in November

Credit Type: CPE, DRC



Regulating for Solvency

This course is designed to help financial regulators develop or hone critical thinking skills used when identifying and assessing risks that threaten an insurer's solvency.

Instruction focuses on the causes of insolvency covering specific risks, their impact on solvency, available regulatory tools and information for use in analysis and examination, and follow-up actions examiners and analysts can take once the information is known and gathered.

Online, Self-Paced

Offered Monthly beginning in August

Credit Type: DRC, PIR

IPIR Prerequisite



Regulating Risk Retention Groups

In this course, you'll gain a well-rounded understanding of this specialized group of federally chartered insurers within the property and casualty market. Whether you're a financial analyst or examiner, attorney, or property and casualty actuary, this course will enhance your processes and procedures to effectively regulate and understand the operation of Risk Retention Groups (RRGs). You'll not only learn the regulatory requirements, but also explore the issues

and controversial topics associated with RRGs across the country.

Online, Self-Paced

Offered in October

Credit Type: DRC, PIR



Risk-Based Capital

This course is designed for financial examiners and analysts in Departments of Insurance, as well as insurance company personnel who would like to better understand what Risk-Based Capital is, and why it is an important solvency regulation tool.

Online, Self-Paced

Offered in November

Credit Type: DRC, PIR



Risk-Based Capital (RBC) Updates Webinar

This webinar provides learners with an update on changes adopted to each of the RBC formulas at year-end. This webinar also includes a discussion of items under consideration for future enhancements and changes to the formulas.

Webinar

Offered in October

Credit Type: CPE, DRC



Risk-Focused Examinations

This course is designed to provide the fundamental principles and processes associated with risk-focused examinations in order to conduct effective financial examinations by focusing on the areas of greatest risk.

Online, Self-Paced

Offered Weekly

Credit Type: DRC, PIR



Risk-Focused Exams: The Role of the Actuary

This course is designed to prepare actuaries to support risk-focused examinations. Examiners-in-Charge and other supervising examiners may also benefit from this course to gain a better understanding of how to integrate the actuary into the examination team. While some basic knowledge of risk-focused examinations is discussed, it may be helpful to be familiar with the NAIC Financial Condition Examiners Handbook.

Online, Self-Paced

Offered Weekly

Credit Type: DRC



Risk-Focused IT Review

Investigating an insurer's information technology (IT) system is a crucial part of the financial examination process. This online course provides an overview of the IT review process, in addition to giving you a chance to see its real-life application through case studies.

This course is designed for financial and IT examiners with limited IT review process experience.

Online, Self-Paced

Offered Weekly

Credit Type: DRC, PIR



TECHNICAL TRAINING

SERFF

This NAIC instructor-led course is designed specifically for industry personnel associated with submitting electronic filings with the SERFF (System for Electronic Rates and Forms Filing) system. This hands-on training will enable you to better understand the SERFF application and the entire filing process.

Live Virtual

Sessions offered January-December

Credit Type: CE

ACRONYMS

- APIR:** Associate Professional in Insurance Regulation
- CPE:** Continuing Professional Education
- DE&I:** Diversity, Equity, and Inclusion
- DRC:** Designation Renewal Credit
- GAAP:** Generally Accepted Accounting Principles
- GCC:** Group Capital Calculation
- IAIS:** International Association of Insurance Supervisors
- IT:** Information technology
- IPIR:** Investment Professional in Insurance Regulation
- MCAS:** Market Conduct Annual Statement
- MIS:** Management Information Systems
- NASBA:** National Association of State Boards of Accountancy
- NIPR:** National Insurance Producer Registry
- P/C:** Property and Casualty
- PIR:** Professional in Insurance Regulation
- SAP:** Statutory Accounting Principles
- SERFF:** System for Electronic Rates & Forms Filing
- SPiR:** Senior Professional in Insurance Regulation
- STLDI:** Short-Term, Limited-Duration Insurance
- UCAA:** Uniform Certificate of Authority Application

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NAIC NATIONAL ASSOCIATION OF
INSURANCE COMMISSIONERS