



Professional in Insurance Regulation (PIR)

American College of Financial Services

Financial Planning: Process and Environment
Fundamentals of Insurance Planning
Fundamentals of Income Taxation
Planning for Retirement Needs
Investments
Fundamentals of Estate Planning
Personal Financial Planning: Comprehensive Case Analysis
Contemporary Applications in Financial Planning

America's Health Insurance Plans

Dental Benefits
Disability Part II, Advanced Issues
Fraud Part II, Key Products
Fraud Part II, Legal Issues
HIPAA Primer
HIPAA: Insurers, Guide for Insurance Company Workers
Long-Term Care Part II, Financing
Managed Care Part B, Management Structure
Medical Management Part II, Utilization Management
Medical Management Part III, Call Centers
Supplemental Health Insurance

The Institutes (formerly AICPCU)

Personal Risk Management and Property-Casualty Insurance
Multiple Lines Insurance Production
Agency Operations and Sales Management
Property Loss Adjusting
Liability Claim Practices
Contract Surety
Insurance Uses of Technology
Statutory Accounting for Property-Casualty Insurers
Insurance Information Systems
Finance and Accounting for Insurance Professionals

Delivering Insurance Services
Ocean Marine Insurance
Inland Marine Insurance
Personal Insurance: Underwriting and Marketing Practices
Personal Insurance: Portfolio Management and Issues
Principles of Premium Auditing
Reinsurance Principles and Practices
Risk Assessment
Surplus Lines Insurance Operations
Surplus Lines Insurance Products

International Center for Captive Insurance Education (ICCIE)

An Introduction to Alternative Risk Financing Mechanisms
Understanding Risk and Risk Retention Mechanisms
Forming and Operating a Captive
Business Ethics in the Captive Insurance Industry

IRES (Insurance Regulatory Examiners Society)

MCM Program

LOMA courses

Marketing Distribution and Uses of Annuities
Annuity Systems and Administration
Regulation and Taxation of Annuities
Agency Administration
Management Principles and Practices
Accounting and Financial Reporting in Life Insurance Companies
Consumer Behavior; Consumer Behavior and Beyond
Customer Contacts; Strategies and Operations
Underwriting Life and Health Insurance
Bank Insurance Compliance: Fundamentals
Insurance Company Operations
Personal Financial Planning
Business Law for Financial Services Professionals
Investment Principles and Institutional Investing



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Financial Services and Products for Organizations
Customer Service Strategies for the Health Care Environment
Personal Financial Planning
Survey of Commercial Risk Management and Insurance
Commercial Underwriting: Principles and Property
Principles of Suretyship
Essentials of Risk Control
Financial Planning: Process & Environment

Society for Financial Professionals (CLU) courses

Income Taxation
Life Insurance Law
Group Benefits
Investments

SOFE (Society of Financial Examiners) courses

Life & Health Insurance Accounting
Property & Liability Insurance Accounting

Note:

The following is a non-inclusive list of approved course providers for continuing education for the designation program. The Designation Advisory Board must approve other potential course providers in advance.
The Designation Advisory Board should approve specific courses for the renewal of a designation in advance.