

ASSESS AND EVALUATE RISKS PERSONAL LINES UNDERWRITER

A custom learning path to navigate your way toward a thriving career.



THE UNDERWRITER

UNDERWRITERS evaluate the risks and exposures of potential insureds. They measure risk exposure and determine appropriate coverages as well as premiums. The Underwriter acquires and writes business that is profitable and conforms to the carrier's desired risk appetite. They identify risks, analyze risk exposure, and draw conclusions based on severity and frequency of risks.

THE UNDERWRITER LEARNING PATH is designed to guide you towards unbridled career growth—whether you are new to your career or a seasoned professional. Walk through our professional development offerings, choose the level appropriate for you, and get closer to achieving a thriving career.

START

intro series

INTRO TO PROPERTY & CASUALTY INSURANCE

Property and Casualty insurance is the backbone of the industry. Learn the basic P&C concepts as the first step on your learning path.

INTRO TO PERSONAL AUTO

Learn how the Personal Auto Policy actually works. Knowing the parts and purpose of the personal auto policy is primary for every insurance professional.

intro series



INSURING PERSONAL AUTO EXPOSURES

Identifying the right personal automobile policy and being able to modify it appropriately are skills valued by clients and their families.



INTRO TO PERSONAL RESIDENTIAL PROPERTY

What are the main provisions of the Homeowner's Policy? Find out how to protect a client's most important asset.

intro series



INSURING PERSONAL RESIDENTIAL PROPERTY

Nothing hits home more than a personal lines loss. Client retention depends on developing relationships and learning to identify the specific exposures each client contends with.

PERSONAL LINES MISCELLANEOUS

Get ready to learn about the property and liability coverage provided—or not provided—by the homeowners policy for recreational vehicles.



ELEMENTS OF RISK MANAGEMENT

Insurance Service Representatives can benefit from an understanding of the risk management process.

AGENCY OPERATIONS

Agency Operations can transform you into an indispensable team player in any insurance agency or give you confidence to move into another position.



EARN THE CISR DESIGNATION



PERSONAL LINES

Learn how to develop a strong personal lines book of business, identify which clients provide the most revenue and ways to grow commission income with this comprehensive course.

UNDERSTANDING COVERAGE DIFFERENCES

Learn to apply risk management tools and diagnostic skills to create a comprehensive risk management and insurance programs for these clients with sophisticated lifestyles.



PERSONAL CLIENT RISK MANAGEMENT

Gain valuable knowledge of the high net worth market and how to better serve your affluent and high net worth clients as their Personal Risk Manager.

PRACTICAL APPLICATIONS OF PERSONAL RISK MANAGEMENT

Learn how to develop and sustain a high net worth client division with effective relationship management.



EVALUATING & PROTECTING THE LIFESTYLE

Personal Risk Managers structure insurance and risk management programs to protect the unique lifestyle of their high net worth clients.

EARN THE CPRM DESIGNATION



4 INTRO SERIES CERTIFICATES



CISR DESIGNATION DIPLOMA & PIN



CPRM DESIGNATION DIPLOMA & PIN

COMPREHENSIVE LEARNING

DYNAMICS MASTER SALES

INDUSTRY SPECIFIC SALES TRAINING COURSES

PROFocus series

HIGH-LEVEL INSURANCE AND RISK EDUCATION TOPICS

WILLIAM T. HOLD SEMINARS

40+ ESSENTIAL SPECIALTY, AND ADVANCED TOPICS