

Certified Managing General Agency (CMGA) Application and Renewal



Whether you are looking to become a CMGA or you are re-qualifying, the benefits of professional development will be a source of pride for the employees in your agency, and a continued source of confidence and business from your customers and markets. The following information is provided to assist you in completing the submission form to be reviewed and approved by the Accreditation Committee.

Overview

The CMGA designation reflects the many educational activities of your employees. As a result, you can obtain the hours from a variety of sources:

- All classroom and online AAMGA University Courses.
- Industry education such as CPCU, CIC, ASLI, AINS, ARM, AU, etc.
- Representation on AAMGA Committees or Board

Designation Requirements

Minimum requirements for obtaining the designation are listed below.

- Six hours of industry education must be completed by all full-time employees who are actively involved in the day to day insurance operations of your business. Of these hours, a minimum of 30% must be earned via AAMGA University courses.
- If you seek University credit for an in-house course not taught directly by the AAMGA University, these hours may not count toward more than 10% of the required 30%. For example, if a member of your staff teaches a three-hour in-house class for 10 of your employees, the 30 hours can comprise no more than 10% of the total AAMGA hours required.
- No one employee can contribute more than 25% of the required hours.

Summary

Agency _____

Contact Person _____

Address _____

City _____ State _____ ZIP _____

Phone _____ Fax _____

E-Mail _____

Step 1: Determine the number of hours required in order to receive the CMGA designation.

Full time employees:* _____ X 6 Hours = _____ Total Education Hours Required

*Note - Count only full-time employees in insurance related functions, i.e. underwriting, rating, sales, etc. Excluded staff might include mailroom staff, facilities support, etc.

Step 2: Determine staff participation in University courses/programs

Please attach a list of all employees' training events, including length of courses.

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Step 3: List staff participation in non-University technical/insurance education programs

This includes IIA, CPCU, CIC, ASLI, local continuing education courses, etc.

- CPCU Course 40 Hours allowed
- CIC Course 20 Hours allowed
- The Institutes Course 20 Hours allowed
- Registered Professional Lines Underwriter (RPLU) 20 Hours allowed
- CISR, CPSR, ACSR 6 Hours allowed
- Any course receiving state CE Credit Applicable state hours

Please attach a list of all completed approved courses.

Step 4: Consider Additional Hours

Be sure to consider any additional hours obtained in the form of non-University, non-technical courses and attendance at company meetings with educational activities included. Examples include attending courses offered by the American Management Association, Fred Pryor, and other outside vendors.

University hours are also awarded for:

- AAMGA Committee Representation 4 University Hours
- AAMGA Committee Chair 6 University Hours
- AAMGA Board Representation 8 University Hours

Step 5: Calculation of Qualifications

Total Education Hours Required (from page 1): _____ (Line A)

AAMGA University Hours. Must be equal to
or greater than 30% of Line A: _____ (Line B)

Staff participation in non-University technical/
insurance education courses _____ (Line C)

Additional hours earned for chairing or serving on
committees, board representation, etc. _____ (Line D)

Your total education hours (add Lines B-D): _____ (Line E)

If **Line E** is equal to or greater than Line A, Congratulations! You have qualified for the Certified Managing General Agency (CMGA) Designation.

Example:

Your agency has a total staff of 15 people and 10 of those employees are involved in underwriting, rating, sales, etc. This means that you will need 60 hours (6X10) of approved educational hours to qualify. Of this total, 30% (or 18 hours) must be earned by participating in AAMGA University courses. The balance of the total (42 hours) may be earned by completing any of the courses or AAMGA service as listed above.

Questions or to apply, contact:

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