



Certified Insurance Wholesaler (CIW) Application

Name

Agency/Company

Address

Phone

E-Mail

AAMGA University recognizes individual continuing professional development by awarding the CIW designation. To qualify, members are required to complete a specific number of University and/or non-University courses and complete a project. A description of the qualifications and allowable hours for attendance at non-University programs are listed below. Follow the steps listed below to determine what you need to do to receive your designation.

CERTIFIED INSURANCE WHOLESALER (CIW)

Overview

A person who wishes to obtain the CIW designation must complete 64 education hours and submit a project designed to demonstrate the individual's knowledge and expertise in the wholesale insurance field. AAMGA University's Designation Sub-Committee will approve the project idea and will evaluate the completed work for acceptability.

How Do I Qualify?

Of the 64 required hours, a minimum of 40 hours must be earned from AAMGA University educational courses. These may be stand-alone, University courses offered in conjunction with AAMGA meetings (ex. University courses attended at University East, University West, Underwriting Boot Camp, Automation Conference, AAMGA Annual Meeting, UFO Annual Meeting), instruction hours for AAMGA University (ex. courses taught at University East, University West, Underwriting Boot Camp, Automation Conference, AAMGA Annual Meeting, UFO Annual Meeting), sponsored University courses delivered on-site or in a local venue, or On-Line AAMGA University courses. A maximum of 24 hours may be earned through completion of approved self-study courses, designations, or prior educational activities.

Part I – AAMGA University Credit – Minimum of 40 credits

40 of the 64 credit hours must be attained through University Credit (i.e. University East, University West, University On-Line, Underwriting Boot Camp, Automation Conference, AAMGA Annual Meeting, UFO Annual Meeting, or University Instruction)

Number of University Workshop hours completed _____

Number of University On-Line hours completed _____

Number of University Hours Instructed _____
(ex. Instructed at University East, University West,
Underwriting Boot Camp, Automation Conference,
AAMGA Annual Meeting, UFO Annual Meeting)

Part II – Industry Education and Designations – Maximum of 24 credits

Designation/Degree	Credits Allowed*	Number of Credits
CPCU designation	24	_____
College degree with insurance emphasis	24	_____
CIC designation	12	_____
Associate designation granted by The Institutes	12	_____
Associate in Surplus Lines Insurance Designation (ASLI)	20	_____
Registered Professional Lines Underwriter (RPLU)	12	_____
*Partial credits are not offered		
	Total Credits	_____

Part III – Project

In order to receive the CIW designation, the applicant must complete a project. This can include a paper/report, preparing or teaching a University course, submitting a research paper for publication in Wholesale Insurance News (WIN) Magazine, or other related activity. Please note that is important to obtain approval from the Designations Sub-Committee prior to beginning work on your project.

Project Title: _____

Estimated Completion Date: _____

Project Description and how my project will benefit the AAMGA:

Important Information for Individual Designations

1. There is no time limit for accumulating hours to qualify for either designation. (Ex. If you took a University General Liability course from in 1991, the hours would count toward earning your designation today.
2. The CIW designation has a **continuing education requirement to complete a minimum of 32 credits every two years. Please see renewal application for specifications.**
3. As a part of the evaluation and approval process, the Designations Sub-Committee reviews the total number of hours as well as the variety of courses taken. It is important to diversify and participate in programs from the representative areas of your book of business.
4. Finally, the CIW designation application and supporting material must be received by the University on or before **March 1** if the designee would like to be recognized at the Annual Meeting.

PAST/POTENTIAL DESIGNATION PROJECT TOPICS

- Deregulation and the impact on the wholesale insurance industry
- Court decisions: How they change policy coverages
- Association and the insurance industry-what do they do for members
- The consolidation of the property and casualty insurance industry
- How to successfully implement a new automation system-a case study
- Electronic data interface (or exchange): A practical approach
- Successful recruiting of new employees
- How to develop and implement a top-notch employee orientation program
- Managing and motivating today's workers. New strategies for a new century
- Employee performance reviews: Balancing expectations and rewards
- Underwriting the unexpected: Techniques for achieving profitable growth
- A wholesaler's view of the reinsurance industry
- Effective claims management skills and customer retention
- Managing a retail sales force: Options for growth and profit
- Selecting business partners for 2000 and beyond
- Negotiation skills: Win-win with your carriers
- Effective new product introductions-do it right the first time
- On the job training for your employees: How to make it work
- How to use insurance industry training programs to your advantage
- Effective marketing trips: More than a free lunch!
- Programs in the insurance industry: A case study of how one really works
- Using the national flood insurance program for your clients
- The non-standard auto market-are you getting your share?

Submit all materials to: Alyssa Bouchard
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