

Insurance Designations



EVERGREEN
INSURANCE

Property and Casualty

Accredited Adviser in Insurance (AAI)

The AAI designation program, which is specifically for agency personnel, was originally created through the combined efforts of the IIA and the IIABA. The program teaches practical, real-world skills that agency personnel need to gain a competitive edge in the property-casualty insurance market.

Associate in Fidelity and Surety Bonding (AFSB)

The AFSB designation signifies that an individual working in this field has attained comprehensive knowledge of both contract and non-contract surety, as well as crime insurance.

Associate in Claims (AIC)

The AIC program provides an introduction to the claim representative's role and function. It examines a wide variety of claims, including property, auto, workers compensation, and bodily injury. It also covers communication and negotiation skills.

Associate in General Insurance (AINS)

The AINS designation provides a solid foundation on which to build a career in insurance. The courses cover insurance principles, practices, and policies in depth.

Associate in Insurance Services (AIS)

The AIS designation signifies that an individual working in the field of insurance has attained comprehensive training in enhanced customer focus, as well as process management and improvement.

Associate in Personal Insurance (API)

The API designation is the undisputed professional credential for persons whose area of specialty is personal lines insurance – personal insurance business (including underwriting), marketing practices, the personal insurance environment, etc.

Associate in Risk Management (ARM)

The ARM designation signifies that an individual working in this field has attained a comprehensive understanding of the risk management process, from analysis to implementation and monitoring; risk retention and transfer; and the latest in advanced risk financing techniques.

Associate in Commercial Underwriting (AU)

The AU designation is the undisputed professional credential for persons who work as a commercial lines underwriter. The program covers underwriting principles including identification of loss exposure, knowledge of coverage, key underwriting questions or considerations, loss control techniques, and the underwriting decision-making process, among others.

Agribusiness and Farm Insurance Specialist (AFIS)

The AFIS designation is the foremost specialized designation for specialists in the agricultural and farm insurance industry. The designation signifies that an individual working in this field has obtained a measurable standard of understanding of farm and agribusiness risks.

Certified Insurance Counselor (CIC)

The CIC designation signifies that an individual working in the insurance field has attained comprehensive knowledge by virtue of completing the five 'institutes' that comprise the program: Agency Management, Commercial Casualty, Commercial Property, Life & Health, and Personal Lines.

Chartered Property Casualty Underwriter (CPCU)

The CPCU designation signifies that an individual working in the field of property/casualty insurance has gained a broader understanding of property/casualty insurance, enhanced by a concentration in either commercial or personal risk management insurance.

Certified Insurance Service Representative (CISR)

The CISR designation signifies that an individual working in the field of property/casualty insurance has gained an understanding of property/casualty insurance, for the purpose of servicing the needs of an insurance customer. This is achieved by completion of five courses of study including Personal Lines, Commercial Lines and Agency Operations.

Certified Risk Manager (CRM)

The CRM program is conducted by the National Alliance for Insurance Educational & Research. A designation that is earned after the completion of five practically oriented courses, including Risk Management Principals, Analysis, Risk Control, Finance and Practice.



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Life, Health and Financial Services

Chartered Life Underwriter (CLU)

Designation granted by The American College, Bryn Mawr, PA, representing the pinnacle in insurance knowledge. CLU professionals must complete eight required courses and pass an exam that shows in-depth knowledge of the insurance needs of individuals and business owners. Financial representatives with this credential specialize in life insurance and estate planning strategies.

Chartered Financial Consultant (ChFC)

Designation granted by The American College, Bryn Mawr, PA. ChFC candidates must complete several years' worth of examinations and training. ChFC professionals are guided by a strict code of ethics involving professionalism, client service and continuing education requirements. They have in-depth knowledge of key financial services disciplines including insurance, income taxation, retirement planning, investments, and estate planning strategies.

Certified Employee Benefit Specialist (CEBS)

The CEBS program is designed to help individuals develop a comprehensive understanding of employee benefit principles and concepts in three distinct areas of specialization: group benefits, retirement and compensation.

Compensation Management Specialist (CMS)

The CMS program is designed to help individuals understand the principles of human resources, compensation design and administration and executive compensation.

Financial Services Specialist (FSS)

The FSS program offers essential financial sales training, planning fundamentals and key industry products and services like annuities, employee benefits and life insurance.

Group Benefits Associate (GBA)

The GBA designation focuses on health care and other group benefits. Candidates must complete coursework in employee benefits (healthcare and welfare) and health economics, as well as either human resources and compensation management or personal financial planning.

Life Underwriter Training Council Fellow (LUTCF)

The American College and the National Association of Insurance and Financial Advisors (NAIFA) jointly confer the LUTC Fellow designation. Candidates must complete six required courses and pass a final examination. The designation reflects a commitment to the NAIFA Code of Ethics and knowledge of insurance applications.

Registered Financial Planner (RFP)

The Institute of Advanced Financial Planners and its hallmark professional designation, the RFP (Registered Financial Planner™) represent the highest standard of excellence in the competency of financial planning. RFPs are dedicated planners, capable of providing impartial, comprehensive advice for complex cases, and committed to furthering the financial knowledge and well-being of their clients. Professionals with this designation have not only acquired formal professional training, but have proven by exam and example that they can provide written financial plans of the highest quality and to the most stringent standards.

Registered Health Underwriter (RHU)

The RHU is issued by the American College, Bryn Mawr, PA, after completing three courses. RHU professionals are required to continue learning throughout their careers and are committed to maintaining ethical standards. Financial representatives earning the RHU have advanced knowledge of group insurance benefits and health insurance for individuals and families.

Registered Employee Benefits Consultant (REBC)

The REBC designation provides education on pensions, retirement planning, and group medical, disability, and long-term care insurance. REBC is for financial services professionals who are selling or servicing the group insurance, health insurance, retirement planning, and incentive compensation markets.