

# Bricker Professional Education Course Library

## Ethics and Professionalism Series

| Course Title  | Course# | Training Objective   | Credit Hours | Course Format | Credit Eligibility      |
|---|---------|--|--------------|---------------|-------------------------|
| Ethics: <i>Principles and Applications (Part 1)</i> | 240001  | The objective of <i>Ethics: Principles and Application (Part I)</i> is to familiarize the student with the fundamentals of professional ethics and morality. To achieve this goal, a variety of sources of ethical principles are surveyed. These include philosophy, laws & regulations, professional associations, and firms & supervisors. Furthermore, the students are encouraged to apply these principles to their role as insurance professionals through group discussion questions located in the <i>Student Workbook</i> . This course builds the foundation for <i>Ethics: Principles and Application (Part II)</i> where the student will learn to effectively apply ethical concepts to both decision-making and insurance-based case studies. | 1<br>Ethics  | Classroom     | L,AH,PC,<br>Title, PACE |
| Ethics: <i>Principles and Applications (Part 2)</i> | 240008  | The objective of <i>Ethics: Principles and Application (Part II)</i> is to familiarize the student with the fundamentals of professional ethics and morality. Beginning with a review of the sources of ethical principles surveyed in <i>Ethics: Principles and Application (Part I)</i> , this course discusses the duties and responsibilities of the insurance advisor and provides a framework for making ethical decisions. Students practice these concepts by reviewing and discussing two case studies illustrating the application of various ethical concepts.  | 1<br>Ethics  | Classroom     | L,AH,PC,<br>Title, PACE |

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| Putting the Client First: <i>Fiduciary Responsibility and Customer Suitability</i> | 1002923 | The objective of <i>Putting the Customer First: Fiduciary Duty and Customer Suitability</i> is to ensure the student understands his or her fiduciary role in the insurance transaction. Exploring the producer's responsibility to both client and insurer, this course outlines important financial management and customer suitability issues enabling the student to confidently fulfill his or her fiduciary role. A significant portion of class discussion is directed toward premium management and recommendations to clients.   | 2<br>Ethics  | Classroom     | L,AH,PC,<br>Title, PACE |
| Sales Representative to Risk Manager: <i>The Evolution of Fiduciary Duty</i>       | 1006114 | The objective of <i>Sales Representative to Risk Manager: The Evolution of Fiduciary Duty</i> is to provide the student with an understanding of the changing nature of fiduciary duty. The course begins with a discussion of the legal history and interpretation of fiduciary duty. Next, the dual nature of the insurance professional's fiduciary duty to both insurer and client is examined. Particular emphasis is placed on the relatively recent expansion of the role of an insurance professional to that of risk manager including tools and resources to fulfill this role. | 2<br>Ethics  | Classroom     | L,AH,PC,<br>Title, PACE |