

# Bricker Professional Education Course Library

## Novice Series

Course Title	Course#	Training Objective	Credit Hours	Course Format	Credit Eligibility
Legal Principles and Contract Analysis	240010	The objective of <i>Legal Principles and Contract Analysis</i> is to familiarize the student with the fundamentals of insurance law and theory. A thorough understanding of the legal framework and contract structure of an insurance policy is essential in facilitating product suitability and disclosure responsibilities of the insurance advisor. To achieve this necessary level of knowledge, the student is exposed to the fundamentals of insurance contract law, legal theories of insurance, insurance contract structure and policy provisions.	2	Classroom	L,AH,PC, PACE
Profile of the Successful Agency (Part 1): <i>Structure and Operations</i>	240006	The objective of <i>Profile of the Successful Agency (Part I): Structure and Operations</i> is to introduce the student to the elements of a professional agency. This course surveys the importance of entity formation, office arrangement, and operations management for the purpose of promoting agency efficiency, profitability, and perpetuation. Students will be encouraged to integrate these concepts into their insurance agency for the benefit of principals, staff, and clients.	2	Classroom	L,AH,PC, PACE
Profile of the Successful Agency (Part 2): <i>Human Resources and Insurance</i>	240007	The objective of <i>Profile of the Successful Agency (Part II): Human Resources and Insurance</i> is to continue the Part I discussion of the elements of a professional agency. This course surveys the importance of human resources management, training, and agency risk management for the purpose of promoting agency efficiency, profitability, and perpetuation. Students will be encouraged to integrate these concepts into their insurance agency for the benefit of principals, staff, and the clients.	2	Classroom	L,AH,PC, PACE

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Course Title	Course#	Training Objective	Credit Hours	Course Format	Credit Eligibility
Risk Management and Insurance Planning	240004	The objective of <i>Risk Management and Insurance Planning</i> is to provide the insurance advisor with the tools and knowledge to manage his or her client's insurable risks. Because insurance professionals necessarily have a fiduciary responsibility to their clients to adequately identify both risks and appropriate risk management solutions, a solid understanding of the process of risk management and, in particular, the use of insurance as a risk financing option is essential.	2	Classroom	L,AH,PC, PACE
Understanding the Insurance Company (Part 1): <i>Organization and Functions</i>	240005	The objective of Understanding the <i>Insurance Company (Part I): Organization and Functions</i> is to provide the student with an understanding of the core component of the insurance industry: the insurance carrier. In particular, this course focuses on the operational organization of various insuring entities and describes the primary activities performed by an insurer. This course provides the foundation for <i>Understanding the Insurance Company (Part II): Regulation and Rating</i> in which the student explores the relationship of the insurer to industry regulators and evaluators.	2	Classroom	L,AH,PC, PACE
Understanding the Insurance Company (Part 2): <i>Regulation and Rating</i>	240009	The objective of <i>Understanding the Insurance Company (Part II): Regulation and Rating</i> is to provide the student with an overview of the insurer's regulatory environment and financial evaluation process. As the result of increasing financial services industry complexity and consolidation, it is imperative that insurance professionals understand both the rationale and method of regulation and its relationship to financial solvency and claims paying ability of the insurer.	2	Classroom	L,AH,PC, PACE