

# AAI – Accredited Advisor In Insurance

Please refer to our [Continuing Education Calendar](#) for course dates

## AAI Designation Program

Establish a clear professional advantage in the marketplace and fulfill your commitment to your customers with the Accredited Advisor in Insurance program. In today's increasingly complex property-casualty insurance marketplace, only producers with in-depth insurance knowledge and a strong focus on customer service have a competitive edge. AAI gives you the professional education you need. Each module provides for 8 CE Credits. Due to the course's concise format, it is imperative that students be prepared so we recommend registering early.

### Why AAI?

- Receive your designation after only 9 courses.
- No Annual dues are required.
- No annual updates - Once you earn the designation, there is no mandatory classroom update requirement.
- AAI is a nationally recognized designation.
- Combine technical knowledge of coverages with sales expertise and apply them to your every day work environment

## How to Earn the AAI Designation

- Register to take the AAI modules – you can register for one at a time or multiple modules
- Receive your course manual approximately six weeks prior to class
- Study and attend the class
- Sit for the multiple choice exam at the end of the class day
- Complete and pass all 9 AAI modules
- Complete the free online [Ethical Guidelines for Insurance Professionals](#) course to complete and receive your designation.\*

### AAI 81A – Principles of Insurance

An overview of the insurance business including principles, nature and organization as well as legal issues, risk management and insurance sales and account development.

**CE Credits:** Classroom - 6 PC + 2 LRE

### AAI 81B – Personal Lines

Includes homeowners, dwelling, flood, personal auto, miscellaneous vehicles, inland marine, aviation and personal umbrella. Additionally personal financial products, social security and various life insurance products will be examined.

**CE Credits:** Classroom - 5 PC + 2 LH + 1 LRE

### AAI 81C – Commercial Property

Includes building and personal property coverage forms, business income coverage forms, causes of loss forms and several commonly used inland marine policies.

**CE Credits:** Classroom - 8 PC

### AAI 82A – Commercial Liability GL & Auto

Includes occurrence and claims-made liability policies and their popular endorsements, commercial auto, garage and truckers policies.

**CE Credits:** Classroom - 7 PC + 1 LRE

### AAI 82B – Commercial Lines

Includes Commercial Crime, Businessowners and Farm Insurance. Workers Compensation and various other miscellaneous commercial coverages including business life insurance.

**CE Credits:** Classroom - 7 PC + 1 LRE

### AAI 82C – Specialized Commercial Lines

Includes specialized property coverages, commercial umbrella, ocean marine and commercial aviation coverages. Additionally, the various types of surety bonds will be examined for proper use and coverages provided.

**CE Credits:** Classroom - 7 PC + 1 LRE

### AAI 83A – Principles of Agency Management

You will learn about the formation and environment of an agency, organizational management, sales management and personal production plans including time management and negotiating skills.

**CE Credits:** Classroom - 8 PC

### AAI 83B – Agency / Company Relations

You will get a closer look at the relationship between producer and insurer, ways of developing the public image of your agency and how to handle agency growth and customer communications. You will also discover the world of market segmentation and target marketing.

**CE Credits:** Classroom - 8 PC

### AAI 83C – Agency Financial Management

The "ins and outs" of agency management as it relates to automation, client services, financial management and the producer's legal and ethical responsibilities.

**CE Credits:** Classroom - 8 PC

### Ethical Guidelines for the Insurance Professional

Completing the free online Ethical Guidelines for Insurance Professionals is a requirement to receive the AAI designation.

[http://www.aicpcu.org/comet/learning\\_modules/ethical\\_guidelines.htm](http://www.aicpcu.org/comet/learning_modules/ethical_guidelines.htm)

Earn the AAI Designation in Only 9 Class Days!

Stay ahead of the Competition with this Nationally Recognized Designation

No Annual Dues!  
No Annual Updates!

The AAI Designation Can Help You:

Increase Commissions  
\*\*\*

Improve your Insurance Knowledge  
\*\*\*

Avoid E&O Claims  
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Earn C.E. Credits

More COST EFFECTIVE  
More FLEXIBLE  
Than Comparable Programs

AAI is the result of a joint effort of the Insurance Institute of America and the Independent Insurance Agents & Brokers of America (IIABA)

## What the AAI Program Can Do For You

- Provide practical marketing tips
- Give producers an edge in the fierce competition for premium dollars
- Describe policies and coverages in detail
- Analyze sales management techniques that help the producer meet the needs of insurance buyers
- Outline agency management methods and explain how to apply them to agency operations
- Describe the information the underwriters need to evaluate and competitively price a submission
- Help producers avoid errors and omissions claims

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