

Take Charge of Your Career



Ignite your Potential with LOMA!

LOMA's Education and Training programs equip you with essential knowledge to improve job performance and accelerate career success. With a variety of topics and delivery formats, our programs will help you take charge of your career!

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Need 2 Know

The Need 2 Know courses, **LOMA 281 – Meeting Customer Needs with Insurance and Annuities**, and **LOMA 291 – Improving the Bottom Line: Insurance Company Operations**, provide foundational knowledge that most other LOMA courses build upon.

These highly interactive online courses teach the basics of insurance and annuity products and provide:

- Job-applicable, industry-specific content
- Short online lessons that can be completed with minimal workday interruption
- Engaging multi-media delivery, including video scenarios and interviews

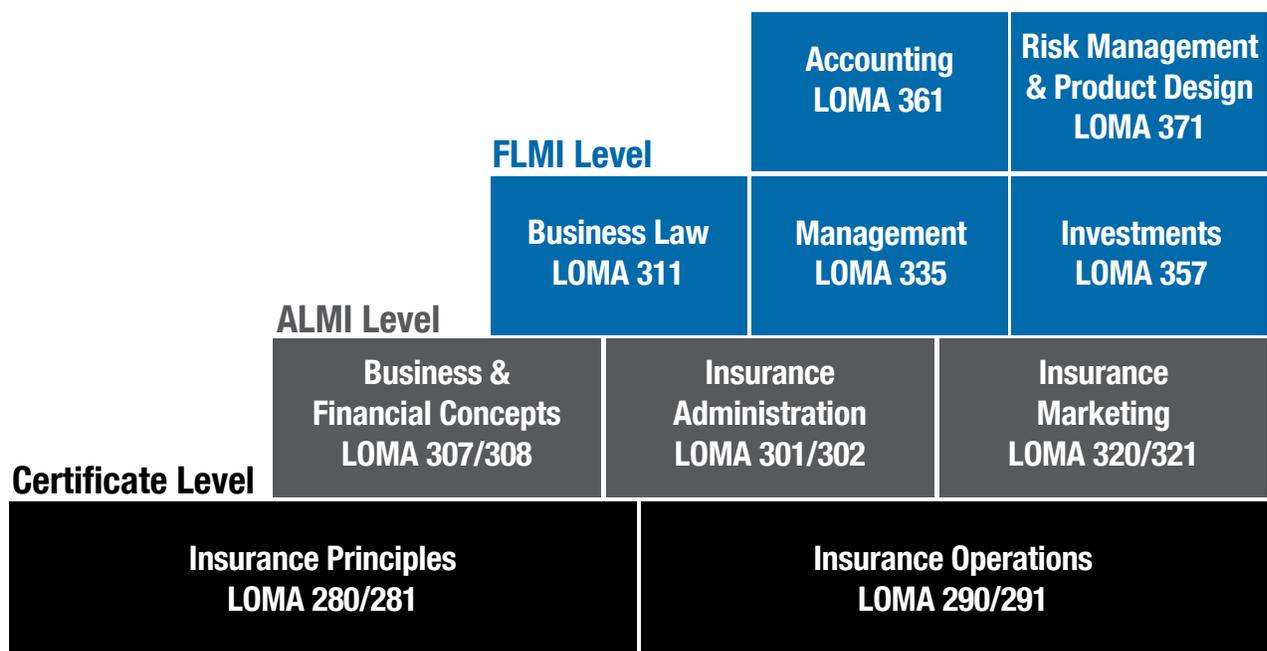
Earn the **Level 1: Insurance Fundamentals Certificate** by completing these two courses (or their traditional course equivalents).

LOMA 281 – Meeting Customer Needs with Insurance and Annuities

Using a variety of media to teach principles of insurance, insurance products, and the policyowner’s contractual rights, this course describes the features of individual and group life insurance and annuity products, and emphasizes how insurance companies meet customer needs through the products they provide.

LOMA 291 – Improving the Bottom Line: Insurance Company Operations

Insurance operations come alive as you enter the fictitious Forthright Financial Services Company and work alongside its employees to improve operational efficiency and effectiveness. As you “visit” each major operational area, actively experience how functions and interrelationships contribute to a company’s financial success and enhance the complete customer experience!





LOMA's Associate Life Management Institute™ (ALMI®) curriculum provides industry-specific education in the context of the insurance and financial services industry. The program delivers need-to-know information about insurance products and operations and job-relevant knowledge about core insurance functions. It also strengthens your business and financial acumen while teaching advanced insurance and financial concepts.

ALMI

Insurance Fundamentals Certificate, plus:

LOMA 301: Insurance Administration -or- LOMA 302: Lifecycle of a Policy: Insurance Administration

Presents a broad overview of insurance product administration, focusing on underwriting, reinsurance, claims, and customer service.

LOMA 307: Business and Financial Concepts for Insurance Professionals -or- LOMA 308: The Business of Insurance: Applying Financial Concepts

Explains financial concepts and financial terminology that all industry employees should understand and relates the concepts and terms to insurance operations and profitability.

LOMA 320: Insurance Marketing -or- LOMA 321: Marketing in Financial Services

Reviews the various elements involved in selling insurance products and the functions of marketing as an integral aspect of the life insurance industry.



FLMI

The Fellow, Life Management Institute™ (FLMI®) teaches advanced insurance and financial concepts to build a deeper understanding of the insurance and financial services business. *ALMI plus:*

LOMA 311 – Business Law for Financial Services Professionals

Examines the basic features and principles of the legal environment in which financial services companies operate.

LOMA 335 – Operational Excellence in Financial Services

Presents financial services from the perspective of a company's operations management, and focuses on practical techniques to accomplish the everyday tasks of providing financial services as efficiently as possible.

LOMA 357 – Institutional Investing: Principles and Practices

Provides an understanding of the investment regulatory environment, and investing for life insurance companies and similar institutions.

LOMA 361 – Accounting and Financial Reporting in Life Insurance Companies

Examines financial and managerial accounting in life insurance companies, including the corporate and regulatory environment in which accounting functions occur.

LOMA 371 – Risk Management and Product Design for Insurance Companies

Describes technical product design for life insurance and annuities and the current state of risk management in insurance companies.

Designation Benefits

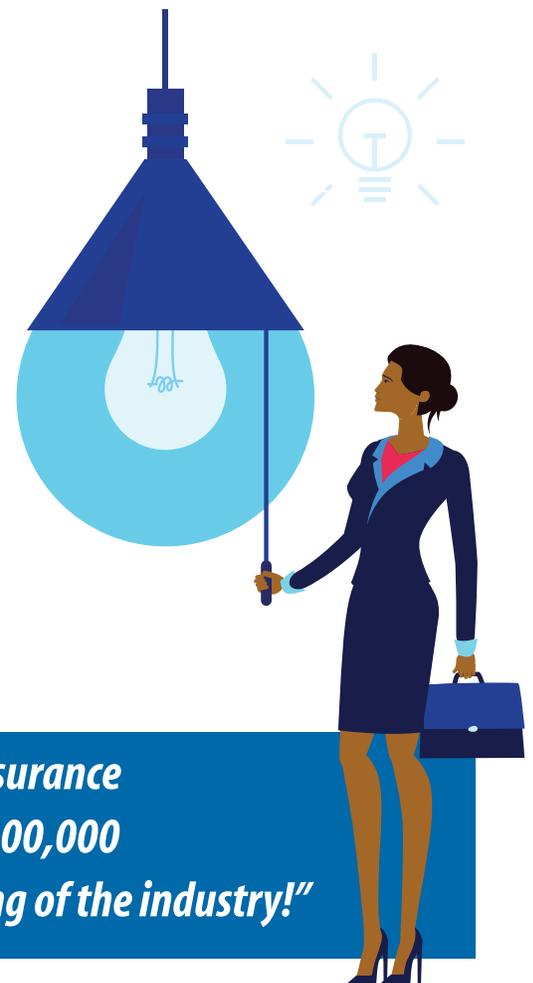
When you successfully earn your FLMI, you will receive a personalized diploma and can proudly include the designation after your name. In addition, you can enjoy the benefits of:

- **LOMA Society Membership**
Network with industry professionals in your area
- **Resource Magazine and additional publications**
Stay current on issues affecting the industry
- **LOMA's Annual Conference and Conferment**
Celebrate in style...

Vancouver, British Columbia

September 5-7, 2018

Fairmont Hotel Vancouver



“ The FLMI® is the world's largest university-level insurance education program and has provided more than 100,000 professionals with a comprehensive understanding of the industry!”



The Associate, Secure Retirement Institute™ (ASRI™) and Fellow, Secure Retirement Institute™ (FSRI™) provide a solid understanding of the “what, why, and how” of the retirement industry. These globally recognized designation programs cover the entire retirement planning and income marketplace in a unique and engaging way.

ASRI/FSRI

- Complements technical training
- Includes both institutional and individual retirement plans
- Improves employee development and mobility



Level 1: Certificate in Retirement Essentials

SRI 111 – Retirement Marketplace

Provides an overview of the retirement savings and income environment, with descriptions of the income needs and available resources of consumers during their pre-retirement and retirement years.

SRI 121 – Retirement Savings and Investments

Describes the range of individual and group products and plans that individuals use to save and/or provide an income for retirement, as well as their advantages and disadvantages and taxation.

SRI 131 – Planning for a Secure Retirement

Describes the tools and other resources people can use to create a retirement plan that helps them reach their retirement goals, outlining steps in the planning process and behavioral factors that explain why people should, but often don't, create retirement plans.





Retirement Education for Financial Professionals

ASRI

Level 1: Certificate in Retirement Essentials, plus:

SRI 210 – Successful Retirement Outcomes

Focuses on the increasingly significant business of retirement income. With the number of retirees projected to grow to 64 million by 2025, providing retirement income services to these individuals will be vital for leading retirement providers of all types. This course teaches key business concepts valuable for customer facing, operations, technology and other associates.

SRI 220 – Retirement Marketing and Business Acquisition

Educates learners about the stakeholders and dynamics of the business acquisition process for both institutional and retail retirement markets, with a primary focus on market segmentation, product development, distribution and customer engagement. The course will also examine the impact of government policies, consumer behavior, and economic conditions on marketing and distribution strategies.

SRI 230 – Retirement Administration

Delivers knowledge about administration functions for existing retirement products, accounts, and plans and incorporates a theme of enhancing the customer experience.

FSRI

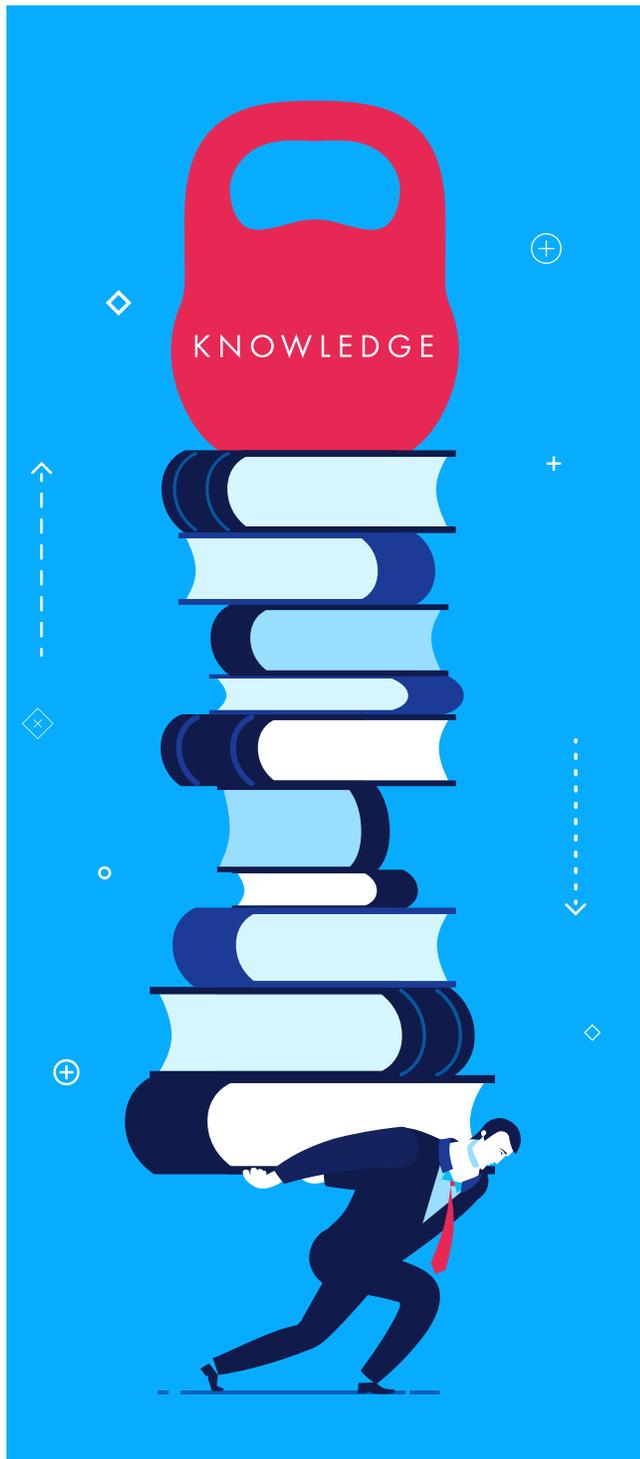
ASRI plus:

SRI 500 – Transforming Retirement Security

SRI 500 provides an overview of the current retirement system (Social Security, employer-sponsored retirement plans, individual retirement accounts, etc.) and the environment for delivering retirement security in the United States. This course covers the emergence of the retirement system, current federal and state regulation, and future regulatory reform. It examines forces for change, public policy, megatrends that impact the retirement system, and also views the retirement system in a global context, describing retirement systems in selected countries. In addition to examining the achievements of the current retirement system, this course also explores the potential for driving innovation to enhance and possibly transform the retirement system of the future.

This course features an online interactive component and a PDF text with a proctored exam, as well as an assignment segment that challenges learners to demonstrate understanding and application of course concepts.





In a changing industry, one thing remains constant... customers expect more from your company. Get the knowledge and skills you need to exceed their expectations with the Associate, Customer Service™ (ACS®) designation!

The ACS Program helps you:

- Increase your knowledge of financial services
- Understand customer expectations, patterns and behavior
- Organize an effective customer service team
- Improve your company's bottom line

ACS – Life Insurance Track

Required Courses:

ACS 100: Foundations of Customer Service -or- ACS 101: Customer Service for Insurance Professionals

LOMA 280: Principles of Insurance -or- LOMA 281: Meeting Customer Needs with Insurance and Annuities

LOMA 290: Insurance Company Operations -or- LOMA 291: Improving the Bottom Line: Insurance Company Operations

-or-

ARA 440 – Reinsurance Administration

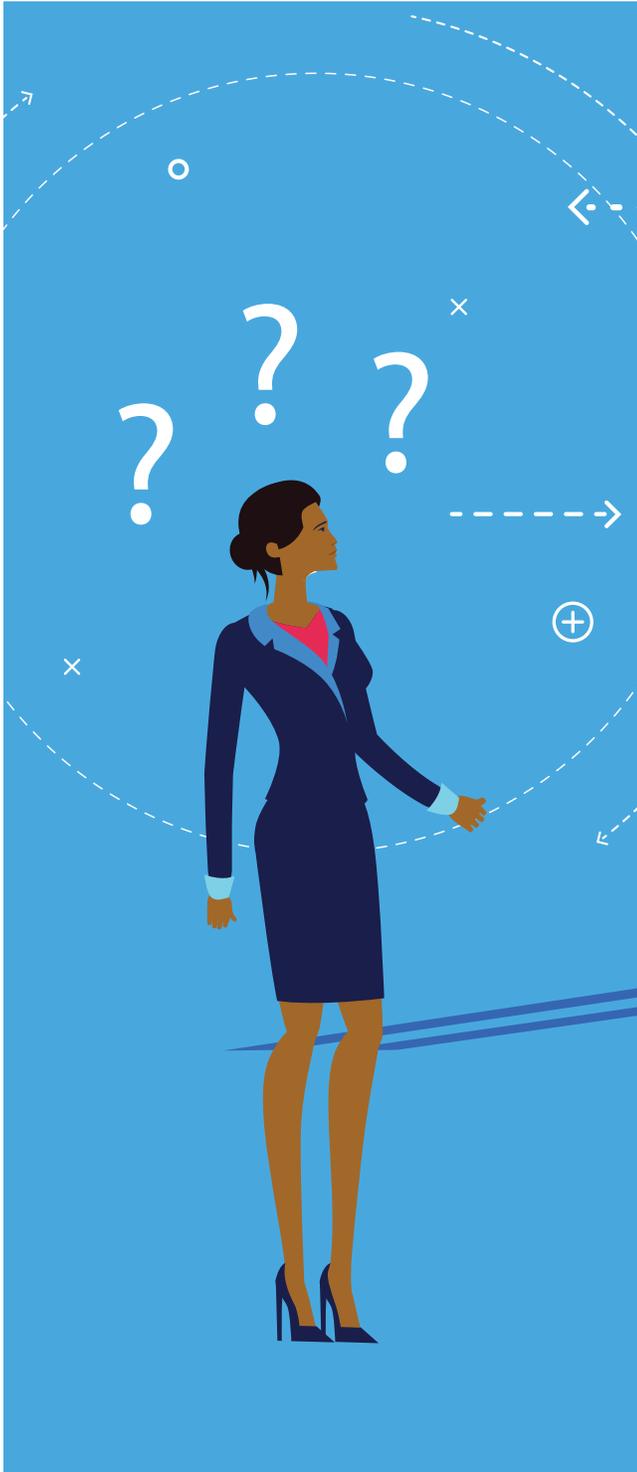
Elective Courses: (choose two)

LOMA 301: Insurance Administration -or- LOMA 302: Lifecycle of a Policy: Insurance Administration

LOMA 307: Business and Financial Concepts for Insurance Professionals -or- LOMA 308: The Business of Insurance: Applying Financial Concepts

LOMA 320: Insurance Marketing -or- LOMA 321: Marketing in Financial Services

¹For detailed information about each track's required and elective courses, visit www.loma.org.



Compliance is one of the most critical issues facing financial services companies today. LOMA's Associate, Insurance Regulatory Compliance® (AIRC™) Program helps you understand the regulatory environment in which your company operates and will give you a better understanding of:

- Compliance concepts, terms, processes, and regulatory requirements
- The ways that states and the federal government regulate insurance companies
- Financial examinations and market conduct examinations
- Required filings for life insurance products, health insurance products and annuities
- The ways that federal securities laws apply to the sale of financial products
- Specific regulations governing insurance and annuity products

AIRC Courses

Level 1: Insurance Fundamentals Certificate, plus:

LOMA 311 – Business Law for Financial Services Professionals

**LOMA 320: Insurance Marketing -or-
LOMA 321: Marketing in Financial Services**

***AIRC 411 – The Regulatory Environment for Life Insurance**

***AIRC 421 – Regulation of Life Insurance Products, Sales, and Operations**

**A Regulatory Compliance Essentials Certificate will be awarded for completion of these two highly interactive courses.*



ARA™ – Understand How Reinsurance Affects Your Work and Your Company



Reinsurance plays a vital role in insurance and financial services. LOMA's Associate, Reinsurance Administration™ (ARA™) Program helps you grasp reinsurance principles, the financial importance of reinsurance, and the development, administration and auditing of reinsurance products. You will gain a better understanding of:

- Key players and the reasons for using reinsurance
- Laws and regulations affecting reinsurance transactions
- Provisions of a reinsurance contract and how they affect the administration of reinsurance transactions
- Processes involved in the administration of new business, in-force business, and terminations

ARA Courses

Level 1: Insurance Fundamentals Certificate, plus:

**LOMA 301: Insurance Administration -or-
LOMA 302: Lifecycle of a Policy: Insurance Administration**

LOMA 361 – Accounting and Financial Reporting in Life and Health Insurance Companies

ARA 440 – Reinsurance Administration

LOMA 311: Business Law for Financial Services Professionals -or-

AIRC 411: The Regulatory Environment for Life Insurance -or-

AIRC 421: Regulation of Life Insurance Products, Sales and Operations



Insurance Immersion

LOMA's Insurance Immersion Program is an interactive learning experience that delivers industry-specific knowledge essential to success in the life insurance and annuity environment. The program, led by a skilled facilitator, involves instruction by industry experts, participation in group activities, and interaction with peers.

Insurance Immersion is designed for employees who need a broad understanding of industry fundamentals.

Program content includes:

- Industry overview, regulation, and compliance
- Life insurance and annuity products, product profitability, and distribution
- Life insurance and annuity operations, including underwriting, customer service and claims
- Finance and risk management

Note: This program does not cover health insurance or group insurance.

For more information about our Insurance Immersion Program, visit www.loma.org, email: insuranceimmersion@loma.org, or call: 770-984-3776.

Insurance Immersion can take place anywhere – in the delivery method that works best for you:

- **In-Person Classroom Sessions:** Public, open-enrollment Immersion sessions move learners from introduction and understanding to application and synthesis through focused discussion about real world challenges and solutions
- **Virtual Classroom Sessions:** Public, open-enrollment Immersion sessions delivered through web conferencing technology; covers U.S. industry and regulations
- **On-site company sessions:** Bring Immersion to your employees by hosting a customized on-site Insurance Immersion program, available in half-day, one-day and two-day sessions; we can also provide a virtual program for your company
- **Train-the-Trainer:** LOMA conducts a complete custom on-site classroom session with your company's facilitators attending as participants, followed by a one-day Facilitator Certification Workshop in which your facilitators learn how to deliver the same program for maximum impact.

Impact Cx: The Quest

Providing an outstanding customer experience is a key differentiator for insurers. LOMA's new online gamified course, Impact Cx: The Quest, is specifically designed to help all life insurance employees learn how they impact the customer experience, no matter their role within the company! Impact Cx: The Quest is unlike anything you've seen before! Accessible from a phone, tablet, or PC, this exciting new course helps employees

- Explain what the customer experience is and why managing it is important to an organization and its employees
- Describe the key touchpoints on the customer journey
- Identify which department's actions affect the customer experience at each key touchpoint
- Describe the voice of the customer (VOC) and the data needed to capture it

- Define the customer journey for financial professionals and end consumers
- Give examples of ways that a company can improve the customer experience at one or more touchpoints
- Distinguish between a customer experience advocate and a problem solver
- Explain how companies measure the customer experience
- Explain how companies estimate the dollar value impact of touchpoints or pain points

Make Impact Cx: The Quest part of your company's Customer Experience initiatives!

Contact membersolutions@loma.org to learn more.

Take Charge of your Career with LOMA!

For more information

Contact your company's LOMA Educational Representative. If you are an independent student, contact LOMA's Office of the Registrar.

"LOMA's education and materials have helped me grow as a person in the financial services industry as well as personally. I've learned new concepts and taken deeper dives into areas that directly affect my role here. It has been a point of pride for me personally to earn each designation."

"I wanted to become more well-rounded about the various departments' functions and their contributions to the organization as a whole. LOMA's designation programs serve as great tools to improve and invest in oneself -- this is where I personally observe LOMA's long-term benefits."

www.loma.org
1-800-ASK-LOMA

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Secure
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