

# INFORMATION TECHNOLOGY: Flexible Learning Path



Start with the recommended learning path on page 2, then select from the options below to complete your personalized learning plan

## TOPICAL KNOWLEDGE

[15-Minute Industry Overview](#)

[Exceptional Customer Service](#)

[Ethical Conduct in the Insurance Industry](#)

[Life of an Insurance Policy](#)

[Pretext and Privacy](#)

[Agency Support Functions](#)

## TARGETED DEVELOPMENT

### Foundational

[Meeting Customer Needs with Insurance and Annuities \(LOMA 281\)<sup>1</sup>](#)

[Improving the Bottom Line: Insurance Company Operations \(LOMA 291\)<sup>1</sup>](#)

[Impact Cx: The Quest](#)

[The Policy Lifecycle: Insurance Administration \(LOMA 302\)](#)

### Proficiency

[The Business of Insurance: Applying Financial Concepts \(LOMA 308\)](#)

[Business Law for Insurance Professionals \(LOMA 311\)](#)

[Operational Excellence for Insurance Professionals \(LOMA 335\)](#)

<sup>1</sup> Certificate in Insurance Fundamentals awarded upon completion of these 2 courses

### Expertise

[Institutional Investing: Principles and Practices \(LOMA 357\)](#)

[Accounting and Financial Reporting in Life Insurance Companies \(LOMA 361\)](#)

[Risk Management & Product Development for Life Insurance Companies \(LOMA 371\)](#)

## LEADERSHIP DEVELOPMENT

**Industry Designations:** [Fellow Life Management Institute \(FLMI\)](#) [Fellow Secure Retirement Institute \(FSRI\)](#)

**Networking & Learning Events:** [Industry Conferences](#) [Technology Committees](#) [Webinars](#) [Facilitated Learning](#) [Societies](#)

**Research on Technology:** [Information Security: Outlook and Trends in the Insurance](#) [Digital Priorities and Challenges](#)

**Resources – Studies & Reports:** [Technology Research](#) [Information Center](#)

# Get Started with the FLMI Level 1

## Earn Your Certificate in “Insurance Fundamentals”



### 60-Day Learning Path

STUDY DATES	Done ✓	<u><a href="#">“Need To Know” Course #1: LOMA 281 Meeting Customer Needs with Insurance and Annuities</a></u>	STUDY DATES	Done ✓	<u><a href="#">“Need to Know” Course #2: LOMA 291 Improving the Bottom Line: Insurance Company Operations</a></u>
Week 1: _____ _____ _____		<b>Module 1 (4 lessons): 3-4 hrs</b> Risk and Insurance	Week 5: _____ _____ _____		<b>Module 1: 3 hrs</b> Company Overview
Week 2: _____ _____ _____		<b>Module 2 (4 lessons): 3-4 hrs</b> Individual Insurance Products	Week 6: _____ _____ _____		<b>Module 2: 4 hrs</b> Product Administration
Week 3: _____ _____ _____		<b>Module 3 (3 lessons): 2-3 hrs</b> Benefits, Provisions and Ownership Rights	Week 7: _____ _____ _____		<b>Module 3: 3 hrs</b> Marketing, Product Development & Compliance
Week 4: _____ _____ _____		<b>Module 4 (3 lessons): 2-3 hrs</b> Group Products	Week 8: _____ _____ _____		<b>Module 4: 2 hrs</b> Financial Management

What people are saying about the FLMI Level 1 courses:



<https://www.loma.org/en/professional-development/catalog/loma-281/>

“Advance Your Knowledge” webinars to help you build a personalized learning plan: <https://www.loma.org/en/events/webinars/ayk-webinars/>