

POLICY SERVICES: 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](#)

[Life Insurance Products](#)

[Replacements of Life Policies & Annuities](#)

[Understanding Best Interest](#)

[Processing Transactions for Life Insurance](#)

[Policy Owner Rights for Individual Life](#)

TARGETED DEVELOPMENT

Foundational

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

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

[Customer Service for Insurance Professionals \(ACS 101\)](#)

¹ Certificate in Insurance Fundamentals awarded upon completion of these 2 courses

Proficiency

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

[Regulation of Life Insurance Products, Sales & Operations \(AIRC 421\)](#)

[Insurance Marketing: Connecting with Customers \(LOMA 321\)](#)

Expertise

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

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

LEADERSHIP DEVELOPMENT

Industry Designations: [Fellow Life Management Institute \(FLMI\)](#) [Associate Customer Service \(ACS\)](#)

Networking & Learning Events: [Industry Conferences](#) [Insurance Services Committee](#) [Webinars](#) [Facilitated Learning](#)

Research on Customer Service: [Tiered Customer Service: Are Insurers Offering This to Policyowners?](#) [Service and Operations Priorities](#)

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

Get Started with the FLMI Level 1

Earn Your Certificate in “Insurance Fundamentals”



60-Day Learning Path

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

What people are saying about the FLMI Level 1 courses: <https://www.loma.org/en/professional-development/accelerate-impact-suite/flmi-level-1/>

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