

UNDERWRITING: 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](#)

[Individual Life Insurance Underwriting](#)

[Understanding Best Interest](#)

[Life of an Insurance Policy](#)

[Life Insurance Products](#)

[Reinsurance Basics](#)

TARGETED DEVELOPMENT

Foundational

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

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

[Underwriting Life and Health Insurance \(UND386\)](#)

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

Proficiency

[Medical Terminology & Proper File Documentation](#)

[Financial Underwriting: Ways To Avoid The “Windfall” Risk in Underwriting](#)

[Underwriting technical training - short courses](#)

Expertise

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

[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 Reinsurance Administration \(ARA\)](#)

Networking & Learning Events: [Industry Conferences](#) [New Business Committee](#) [Webinars](#) [Facilitated Learning](#)

Research on Underwriting: [Electronic Health Records: Gaining Momentum in Life Underwriting?](#) [Being More Direct: A Simplified Experience](#)

Resources – Studies & Reports: [Underwriting 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/>