



INSURANCE **IMMERSION**

Connect with Success



Build a strong foundation of industry knowledge to
drive innovative, viable business solutions.

TEAM MEMBERS WHO are new to the industry or new to management face an uphill climb as they work to understand life insurance operations. Our complex industry poses unique challenges, and getting started can be overwhelming.

THAT'S WHERE INSURANCE IMMERSION COMES IN

This one-of-a-kind, instructor-led program quickly explains these key concepts, which can improve decision-making and collaboration.



CHOOSE A FORMAT TO MEET YOUR NEEDS

Connect In Person

Immerse and engage! Participants learn from expert instructors and network with cross-functional industry professionals, together in one room! Open-enrollment Insurance Immersion is offered over 2 ½ days in various cities throughout the year.

Connect Virtually

All the benefits of a live session, conveniently delivered to participants' desks. They'll learn from industry experts, network with peers and interact in discussions and activities through virtual classroom technology. The cost-effective Virtual Immersion program is offered in 8 two-hour sessions over 4 days.

Connect as a Company

Bring the Insurance Immersion experience directly to your team! We can deliver customized sessions on-site or virtually. Bring cross-functional teams together through interactive sessions and promote meaningful conversation and collaboration in your organization.



THE COMPANY'S ROLE IN THE FINANCIAL SERVICES INDUSTRY

- Key Industry Trends
- Regulation



BASIC FEATURES OF LIFE INSURANCE AND ANNUITY PRODUCTS

- Pricing & Distribution
- Term, Whole Life & UL Products
- Annuities: What, Why & How



KEY OPERATIONAL FUNCTIONS

- Claims: Evaluation & Investigation
- Underwriting: Purpose & Process
- Meeting Customer Needs



HOW INSURERS MAKE MONEY

- Reserves, Capital, Solvency & Profitability
- Improving Operational Performance & Efficiency

TO SUCCEED IN A RAPIDLY CHANGING ENVIRONMENT

Leaders and teams must grasp how business units can work together to help their company grow and thrive. Insurance Immersion promotes the holistic thinking needed to drive efficiencies and optimize outcomes across your organization.

5 WAYS INSURANCE IMMERSION MAKES A POSITIVE IMPACT

- Provides a broad, “big-picture” view of the industry and the business
- Simplifies complex topics so learners can quickly grasp critical ideas
- Encourages strategic thinking about key products and functions
- Promotes collaboration among work groups
- Helps emerging leaders get answers to their most pressing industry questions



INTENSIVE, INTERACTIVE TRAINING THAT DELIVERS

An Effective Educational Experience

Our instructors bridge knowledge gaps through lively, fast-paced sessions thoughtfully developed by a committee of industry experts. Drawing on both technical concepts and real-world examples, these lessons stick with participants long after the session is over.

Engaging Interaction

Insurance Immersion is not for the passive learner! This training provides connection with experienced instructors and other participants, structured hands-on activities, and excellent networking opportunities.

An Industry Perspective

LOMA is highly respected for its industry expertise and high-quality educational programs. In this informal, collaborative setting, participants will apply what they learn to case studies, find answers to their most pressing questions, and hear stories that will bring course concepts to life.

INSURANCE IMMERSION

A Proven Solution for Industry Onboarding & Career Development

More than 5,000 professionals & leaders from over 100 financial services companies have completed this training. Here's what they have to say:

"I really enjoyed this training. It is comprehensive, informative, and provides a great foundation for anyone working at an insurance company. Everyone should take it!"

"Great jumping off point to learn about the life insurance (business), if you're coming in from a different industry."

"Really liked the mix of speakers. They had a great level of enthusiasm/passion for their topics and were certainly knowledgeable."

"Great program. I enjoyed the interactive activities and opportunity for questions and discussion throughout."

Advancing the financial services industry by empowering our members with knowledge, insights, connections, and solutions