

REQUIRED ATTACHMENT CHECKLIST:

A. Contact

Courses:

1. ___ A detailed statement on how the course is relevant to insurance topics and insurance products.
2. ___ A detailed outline of approximately one page per hour of instruction including the time each topic is being presented.
3. ___ A copy of all materials presented to each student if a detailed outline is not submitted with application.
4. ___ An agenda showing the beginning and ending times, breaks, and time allotted for exams, if applicable.
5. ___ A completed Class Presentation Schedule form for each presentation.
6. ___ A current authorization letter from the author or publisher if using another vendor's source material as the basis for the course.
7. ___ California prelicensing educational objectives with page and paragraph-references to the provider course material for every line topic.

(For Prelicensing Courses Only)

B.

Non-Contact Courses:

1. ___ A detailed statement on how the course is relevant to insurance topics and insurance products.
2. ___ DVD, text book for the course or copy of the text cover, copyright page and table of contents if using another vendor's pre-approved material/book.
3. ___ Internet courses must include your Internet address, security measures, log-on and password for our review of course(s). Answers to exam questions must reference section and screen for answer source.
4. ___ A final examination with three questions for each hour of credit and questions scrambled (not in chapter order).
5. ___ Answers to all exam questions with page and paragraph referencing to the provider course material used.
6. ___ A current authorization letter from the author or publisher if using another vendor's source material.
7. ___ Copy of instruction sheet sent to students.
8. ___ A document listing the total word count (4,600 words for each hour of credit).
9. ___ California prelicensing educational objectives with page and paragraph-references to the provider course material every line topic.

(For Prelicensing Courses Only)

C.

Ethics Training Course (attach separate sheet with responses to each of the eight statements listed below):

1. ___ Describe how this course contributes to an agent's understanding of his/her ethical responsibilities.
2. ___ Point out where in the course examples of "good" licensee conduct are given, as well as examples of "bad" licensee conduct.
3. ___ Explain how this course contributes to an agent's understanding of the complexities of ethical decision-making within the context of insurance transactions.
4. ___ Describe where in the coursework an agent may find tools to help the agent identify, prevent, and resolve ethical dilemmas that arise in the course of conducting insurance business.
5. ___ Explain how the content of this course contributes to the producers understanding of proper vs. improper, honest vs. dishonest behavior.
6. ___ Provide two samples of licensee conduct you will use in this course to contrast ethical with unethical behavior and details supporting the judgment of ethical or unethical behavior.
7. ___ Explain how this course demonstrates to whom the licensee "owes" an ethical responsibility in this course and how this course will help the licensee understand his or her ethical responsibilities to such an entity.
8. ___ Explain how this course helps the licensee distinguish between legal and ethical behavior and legal but unethical behavior.

D. Annuity

Training Courses:

Eight-Hour Annuity Training Courses:

1. ___ A copy of the California Department of Insurance Eight-Hour Annuity Training Outline with page and paragraph-references to the provider course material for every line topic.

There are two alternatives to develop four-hour annuity training courses: 1) follow the Four-Hour Annuity Training Course Specific Topic Outlines; or 2) develop four-hour courses based on suggested topics in the Four-Hour Training Course Development and Review Guidelines.

1) Four-Hour Annuity Training Courses Developed With a Course Specific Topic Outline:

1. ___ A copy of the selected California Department of Insurance Four-Hour Annuity Training Course Specific Topic Outline with page and paragraph-references to the provider course material for every line topic.

2) Four-Hour Annuity Training Courses Developed With the Four-Hour Annuity Training Course Development and Review Guidelines (attach separate sheet with responses to each of the four statements listed below):

1. ___ Illustrate with examples how this course provides an enriched and more thorough education than the training in Section V or Section IX from the "California Department of Insurance Eight-Hour Annuity Training Outline".
2. ___ Point out where in the course the examples of how annuity contract provisions impact the senior consumer (Section V, "How fixed, variable, and index annuity contract provisions affect consumers", from the California Department of Insurance Eight-Hour Annuity Training Outline) OR where in the course there are examples of proper and improper annuity sales practices discussed (Section IX, "Introduce sales practices for California insurance agents" from the California Department of Insurance Eight-Hour Annuity Training Outline).
3. ___ Explain how this course contributes to an agent's understanding of the laws governing the design of annuities and the sale of annuity products to seniors in California.

4. ___ Describe where in the course there are tools provided to assist an agent to identify when an annuity product and/or an annuity sales practice are out of compliance with the law.

E. Independent Adjuster and/or Public Adjuster Courses (attach separate sheet with responses to each of the four statements listed below):

1. ___ Describe how this course contributes to an independent/public insurance adjuster's understanding of insurance coverage and claims, how the course relates to the adjusting of insurance claims, and how adjuster competence may be improved by completion of the course.
2. ___ Describe how this course contributes to an independent/public insurance adjuster's understanding of insurance statutes and rules, how the course relates to the adjusting of insurance claims, and how adjuster competence may be improved by completion of the course.
3. ___ Describe how this course contributes to an independent/public insurance adjuster's understanding of specific topics (i.e. construction, commercial, residential), how the course relates to the adjusting of insurance claims, and how adjuster competence may be improved by the completion of the course.
4. ___ Describe how this course contributes to an independent/public insurance adjuster's understanding of valuation, how the course relates to the adjusting of insurance claims, and how adjuster competence may be improved by completion of this course.

F. Life Settlement Broker Courses:

1. ___ A copy of the California Department of Insurance 15-Hour Life Settlement Broker Outline with page and paragraph-references to the producer course material for every line topic

G. Long-Term Care Eight-Hour Long-Term Care Courses:

1. ___ A copy of the California Department of Insurance Eight-Hour Mandatory Long-Term Care Course Outline with page and paragraph-references to the provider course material for every line topic.

H. Homeowners' Insurance Valuation Courses:

1. ___ A copy of the California Department of Insurance Homeowners' Insurance Valuation course curriculum with page and paragraph-references to the provider course material for every line topic

Educational Objectives for prelicensing courses and course guidelines for ethics, annuities, adjusters, life settlement, long-term care and homeowners' valuation are available on CDI's web site at www.insurance.ca.gov. On the home page select Agents and Brokers, then select Applying to Become an Approved Education Provider.

Please send this application along with the proper attachments and filing fee to:

California Department of Insurance
Producer Licensing Bureau-Education Section
P.O. Box 957
Sacramento, CA 95812-0957

Filing fees:
\$28 per Continuing Education Course
\$56 per Prelicensing Education Course
Make check payable to: California Department of Insurance

Course applications must be received in this office at least 30 days prior to the first course presentation date. Course advertisements for pending courses must clearly state that the course has been submitted and is pending approval, if the course application is complete and submitted within the appropriate time frame. Education Section Inquiries: (916) 492-3064.