

# 2018 Education & Training Catalog

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# Key Dates

## January 2018

January 1	LOMA closed for New Year's Day; LOMA's Contact Center unavailable
January 2	Enrollment opens for May 2018 paper exams

## February 2018

February 1	Ed Reps receive certificates and diplomas for November 2017 paper exams
February 9	Deadline to submit paper enrollment forms for May 2018 paper exams
February 23	Deadline to submit enrollments via <a href="http://learning.loma.org">learning.loma.org</a> , and late paper enrollment forms deadline for May 2018 paper exams

## May 2018

May 14–18	Paper exams administered (see page 76 for dates and times)
May 28	LOMA closed for Memorial Day; LOMA's Contact Center unavailable
May 29	Exam question challenges — deadline for receipt at LOMA

## June 2018

June 9	May 2018 paper grades post
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## July 2018

July 1	Enrollment opens for November 2018 paper exams
July 4	LOMA closed for Independence Day; LOMA's Contact Center unavailable

## August 2018

August 1	Ed Reps receive certificates and diplomas for May 2018 paper exams
August 10	Deadline to submit paper enrollment forms for November 2018 paper exams
August 24	Deadline to submit enrollments via <a href="http://learning.loma.org">learning.loma.org</a> , and late paper enrollment forms deadline for November 2018 paper exams
August 31	Last day to complete course requirements to attend the 2018 LOMA Annual Conference and Conferment

## September 2018

September 3	LOMA closed for Labor Day; LOMA's Contact Center unavailable
September 5–7	2018 LOMA Annual Conference and Conferment, Vancouver, B.C. Canada

## November 2018

November 5–9	Paper exams administered (see page 76 for dates and times)
November 19	Exam question challenges — deadline for receipt at LOMA
November 22–23	LOMA closed for Thanksgiving; LOMA's Contact Center unavailable

## December 2018

December 1	November 2018 paper grades post
December 25	LOMA closed for Christmas; LOMA's Contact Center unavailable

## January 2019

January 1	LOMA closed for New Year's Day; LOMA's Contact Center unavailable
January 2	Enrollment opens for May 2019 paper exams

## About This Catalog

LOMA is committed to a business partnership with its worldwide members in the financial services industry to improve their management and operations through quality employee development, research, information sharing, and related products and services.

The mission of LOMA's Education & Training Division is to provide companies in the insurance and financial services industry with a quality education to meet their human resources development needs.

LOMA does not discriminate on the basis of race, color, national origin, sex, pregnancy, religion, age, disability, citizenship, ancestry, service in the uniformed services, sexual orientation, marital status, genetic information, or any other factors protected by federal, state and local law in education policies or eligibility requirements for its Programs.

All statements in this *Catalog* are for informational purposes only and should not be construed as the basis of a contract between a student, Educational Representative (Ed Rep), or participating organization and LOMA. While the provisions of this *Catalog* will ordinarily be applied as stated, LOMA reserves the right to change any provision without any actual notice to students. Every effort will be made to keep students and company Ed Reps advised of any changes. Ed Reps are not agents of LOMA.

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# Advance Your Career

## LOMA's Formula for Success

Start with the trusted source for industry knowledge, add job-relevant course content and convenient course access, and you have a formula for success that industry professionals around the globe rely on to advance their careers!

Our industry is changing. . .and LOMA is keeping pace with these changes in many ways!

- Everyone impacts the customer experience in some way — **Impact Cx: The Quest** is a unique gamified course that helps employees make the most of key touchpoints to impact the bottom line! See page 22 for more information.
- LOMA's newest professional designation program, the **Fellow, Secure Retirement Institute (FSRI)**, is a comprehensive program designed to educate employees who develop, administer, and support retirement plans and products. See page 10 for more information.
- Learners love our popular **highly-interactive online course format!** Engaging content, multimedia delivery, modularized examinations built right into the course — all features that help adult learners make the most of their study time and apply the learning to their everyday lives! See page 28 for more information.
- The evolving **DOL fiduciary rule** is the most substantial regulatory change to impact the industry in decades. How can companies make sure everyone is up to speed? The LIMRA LOMA Secure Retirement Institute has an answer. See page 22 for more information on our course, *DOL Fiduciary Basics for Employees*.

So get started today! Let LOMA's proven formula for success help you advance your career today. . .for a better tomorrow!

### LOMA's diverse content helps you achieve your career goals!

- Annuities
- Business Analysis
- Business Insurance
- Communication
- Company Operations and Administration
- Compliance
- Customer Experience
- Customer Service
- DOL Fiduciary Rule
- Finance and Accounting
- Financial Services and Financial Planning
- Human Resources
- Insurance Fraud
- Insurance Onboarding
- Legal and Ethics
- Life and Health Insurance
- Management and Leadership
- Product Development
- Project Management
- Property/Casualty Insurance
- Reinsurance
- Retirement Planning
- Sales Support
- Sales Training
- Securities and Suitability
- Underwriting

**Disclaimer of Warranty**

Examinations described in this *Catalog* are designed solely to measure whether students have successfully completed the relevant assigned curriculum. The attainment of LOMA designations indicates only that all examinations in the given curriculum have been successfully completed. In no way should a student's completion of a given LOMA course or attainment of any LOMA designation be construed to mean that LOMA in any way certifies that student's competence, training, or ability to perform any given task. LOMA's examinations are to be used solely for general educational purposes, and no other use of the examinations or programs is authorized or intended by LOMA. Furthermore, it is in no way the intention of the LOMA curriculum or examinations to describe the standard of appropriate conduct in any field of the financial services industry, and LOMA expressly repudiates any attempt to so use the curriculum and examinations. Any such assessment of student competence or usual industry practices should instead be based on independent professional inquiry and the advice of competent professional counsel.

**Guidelines for Use of LOMA Materials**

It is unlawful to make unauthorized copies of LOMA texts, study aids, exams, software, this *Catalog*, or any other materials. When companies or students make unauthorized copies of LOMA materials, they engage in illegal activity, thereby depriving LOMA of revenues used for association activities such as new research, training, and development of education programs.

**Who to Contact**

If you have questions about LOMA's Education Programs, contact your company's LOMA Education Representative (Ed Rep) first. If you require additional assistance, or if you are an independent student, please contact:

**LOMA's Contact Center**

6190 Powers Ferry Road, Suite 600  
Atlanta, GA 30339 USA

**Tel:** 1-800-ASK-LOMA (275-5662) (Option 1)  
770-984-3761

**Fax:** 770-984-6415

**E-mail:** [education@loma.org](mailto:education@loma.org)

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# Overview of Products and Services

As a leading provider of learning solutions for financial services organizations around the globe, LOMA offers a wide range of products and services to meet your learning and development needs.

## Content Updates for DOL

All LOMA courses have been reviewed and amended as appropriate to reflect our understanding of the DOL fiduciary rule. The updated content related to DOL fiduciary rule changes does not affect examinations at this time.

Learners enrolled in courses with PDF textbooks available on course portals should be sure to check the [Text Corrections](#) page for updates to reflect the new rule.

As we see what companies do in anticipation of and following the rule's applicability date, we will amend the content again to reflect trends in implementation and practices that are adopted in response to the rule.

## Professional Designation Programs

Since 1932, LOMA has awarded professional designations in insurance and financial services industry education. Each LOMA designation program gives learners a broad understanding of the industry as a whole, and an appreciation for how they can contribute to their companies' success. All LOMA professional designation programs are developed with guidance and support from industry subject matter experts, and are globally recognized as being relevant and engaging. See page 8 for more information.

If you previously used LOMANET to enroll for and access LOMA's Designation courses or LOMALearn to enroll for LOMA's Short Online Courses or Course Collections, note that these courses and your student records are now available through our enhanced learning system. Check it out at [learning.loma.org](http://learning.loma.org).

## Designation Courses

All courses in LOMA's professional designation programs are delivered online, either in a highly interactive format or in a course portal format.

- **Highly interactive format** courses use an engaging, multimedia approach that often includes integrated audio, video, and scenario-based learning. Highly interactive format courses feature several **non-proctored, end-of-module exams** integrated into the course content as part of the learning experience. No separate exam enrollment is required.
- **Course portal format** courses blend a traditional textbook-based study experience (delivered as a PDF) with interactive practice questions, a sample exam, and other review tools, all housed in a dedicated mini website, or course portal. Course portal format courses include enrollment in a **proctored examination that covers the entire course**. These exams are administered on paper or on computer at an approved testing facility.

## Short Online Courses

Whether you are new to the insurance and financial services industry or just want to build new skills, LOMA offers short online courses that can help boost your productivity, performance and success!

Our short online courses engage the learner with interactive lessons and real-life scenarios that reinforce learning related to the industry and, in many cases, are specific to individual businesses or product lines. Online quizzes and knowledge checks provide instant feedback to keep you on track.

Most of these courses can be completed in about an hour! Learn at your own pace with 24/7 on-demand access to LOMA's short online courses.

## Short Online Collections

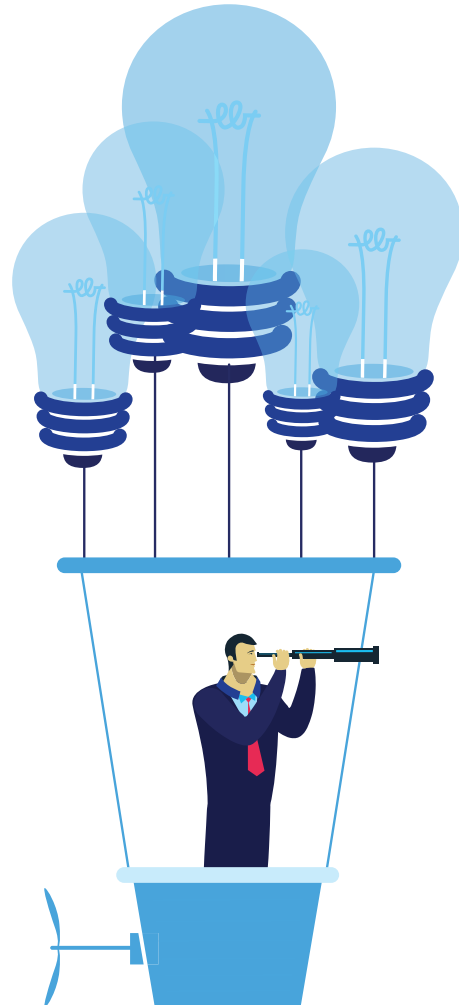
We've combined several short online courses to form collections that focus on a specific aspect of the industry. Short Online Collections range from 2 to 7 courses, all available through one convenient enrollment.

See page 22 for more information about LOMA's short online courses and short online course collections.

## Instructor-Led Training

LOMA offers instructor-led, activity-based programs designed for employees who need a broad understanding of industry fundamentals. Led by skilled facilitators, the programs include instruction from industry subject matter experts, participation in group activities, and interaction with peers. LOMA's popular instructor-led training sessions are delivered in a variety of formats:

- **Public Classroom Sessions** are held several times throughout the year in specified locations. These 2 ½ day sessions are lively and fast paced, and move learners from introduction and understanding to application and synthesis through focused discussion about real-world challenges and solutions. Public classroom sessions are limited to 30 participants.
- **Custom On-site Classroom Sessions** are delivered on-site at your location by LOMA's trainers. Session content can be tailored to fit your company's unique business needs.
- **Custom Train-the-Trainer Classroom Sessions**, in which LOMA conducts a complete custom on-site classroom session with your company's facilitators attending as participants, followed by a one-day Facilitator Certification Workshop in which your facilitators learn how to deliver the same program for maximum impact.
- **Virtual Classroom Sessions** use web-conferencing to deliver the same great training right to your desk. Virtual sessions include the expert instruction and small group activities of the traditional classroom model, and are available in **public sessions or custom sessions** tailored to your company's needs. Virtual classroom sessions are limited to 30 participants.



## Learn More

For more information about LOMA's instructor-led training programs, visit us at [www.loma.org](http://www.loma.org), or contact us:

**Phone:** 770-984-3776

**E-mail:** [insuranceimmersion@loma.org](mailto:insuranceimmersion@loma.org)

Additional instructor-led training and development opportunities are available through LIMRA. To learn how these programs can have a positive impact on your business, contact LIMRA at 888-785-4672 or online at [talentsolutions.limra.com](http://talentsolutions.limra.com).

### Custom Learning & Development Paths

LOMA can tailor time-tested course content to meet your company's unique learning needs with **custom learning and development paths**, based on criteria you specify. By integrating or adapting our courses and designation programs into custom learning paths that appeal to a variety of learning styles, LOMA can design a development program unique to each functional area within your organization. LOMA's team of learning and development professionals match learning content and courses with job families and competencies within jobs for an all-inclusive development solution.

### Customized Solutions

For companies that need more than a standard off-the-shelf solution, LOMA offers customized solutions to maximize your training investment. Some of these options include:

- Certificate programs
- Blended learning tools
- Learning management system (LMS) integrations
- Customized courses

For more information about LOMA's customized solutions, visit [www.loma.org](http://www.loma.org), or email [membersolutions@loma.org](mailto:membersolutions@loma.org).

### Choose your Path to Industry Knowledge

LOMA has education and training solutions to fit your needs. And thanks to [LOMA's enhanced learning system](#), navigating your path to industry knowledge has never been easier!

When you log in to LOMA's learning system, you can see all of your LOMA learning options in one place. Advanced online learning catalog search features allow you to search for LOMA courses based on

- Course topic category
- Designation program
- Course Type
- Course Provider
- Language
- Keyword or phrase

This powerful filtering tool helps you see at a glance all of the LOMA learning opportunities that meet your criteria, and how it all fits together to deliver the solution that's just right for you.

If you are working toward a Professional Designation, the **designation tracking features** in LOMA's learning system will help you stay on target!

The system's user interface is available in a variety of languages — English, French, Spanish, and Chinese — to make your experience better than ever before.





### Course Topic Categories

- Annuities
- Business Skills
- Compliance/Legal
- Customer Service
- Finance/Accounting
- Health Insurance
- Life Insurance
- Management/Leadership
- Marketing
- Operations/Administration
- Property/Casualty Insurance
- Reinsurance
- Retirement
- Sales
- Underwriting

### Designation Programs

- ACS®** Associate, Customer Service™
- AIRC™** Associate, Insurance Regulatory Compliance®
- ALMI®** Associate, Life Management Institute™
- ARA™** Associate, Reinsurance Administration™
- ASRI™** Associate, Secure Retirement Institute™
- CPLHI™** Certified Professional, Life and Health Insurance™ (Bahasa Indonesia)
- FLMI®** Fellow, Life Management Institute™
- FSRI™** Fellow, Secure Retirement Institute™
- LCIC™** LOMA Certified Insurance Consultant™ (Spanish)
- PFLP®** Programa de Formação LOMA em Português™ (Portuguese)
- PFSL™** Programa de Formación en Seguros de LOMA™ (Spanish)

### Languages

- Bahasa Indonesia
- Chinese (Simplified)
- Chinese (Traditional)
- English
- French
- Korean
- Portuguese
- Spanish

### Course Types

- Short Online Courses
- Short Online Collections
- Designation Courses
- Instructor-Led Courses
- Instructor Materials/Discussion Guides

### Course Providers

- LOMA
- LOGIQ<sup>3</sup>
- LRN
- NATG



# Professional Designation Programs

One of the most recognized and respected professional education institutions in the world, LOMA is perhaps best known for programs of study that lead to the internationally recognized professional designations listed below:

- ACS®** Associate, Customer Service™
- AIRC™** Associate, Insurance Regulatory Compliance®
- ALMI®** Associate, Life Management Institute™
- ARA™** Associate, Reinsurance Administration™
- ASRI™** Associate, Secure Retirement Institute™
- CPLHI™** Certified Professional, Life and Health Insurance™ (Bahasa Indonesia)
- FLMI®** Fellow, Life Management Institute™
- FSRI™** Fellow, Secure Retirement Institute™
- LCIC™** LOMA Certified Insurance Consultant™ (Spanish)
- PFLP®** Programa de Formação LOMA em Português™ (Portuguese)
- PFSL™** Programa de Formación en Seguros de LOMA™ (Spanish)

## Track Designation Progress

LOMA's learning system — [learning.loma.org](http://learning.loma.org) — provides quick access to the most current designation program information and materials. Although learners may enroll in individual courses within any of LOMA's programs *without* pursuing a professional designation, the *Designation* tab in LOMA's learning system makes earning a professional designation easier by helping learners and administrators stay on target.

When you enroll in a course that offers credit toward a designation, this feature automatically displays the LOMA professional designations that award credit for that course and allows you to see the progress you've made toward each designation, as well as the remaining courses needed to achieve your designation goals. With this tab, you'll always know exactly what your next steps should be in order to reach the finish line!

Want to see what other designations are available? Simply search the Learning catalog and select the "Designation" category to see all available designations and the courses required for each.

From your account in [LOMA's learning system](#), you have access to a complete record of all your learning activity with LOMA. The *Learning History* tab shows all of your course enrollments and activity in short online courses, professional designation courses, and designation programs.

## Enroll and Access Designation Courses

Once enrolled, learners access the study materials for LOMA's designation program courses through **LOMA's learning system**.

Whether you choose the highly interactive online format with integrated end-of-module exams, or the course portal format with PDF textbooks and proctored exams, LOMA is your one-stop shop for everything you need to succeed. The charts on pages 75 and 77 show the format for each designation course.

## Credit for Retired Designation Courses

In some cases, learners may receive credit for courses that are no longer offered by LOMA. Most of these situations are explained in notes to the tables on the following pages. However learners should check their *Learning History* in LOMA's learning system for the most up-to-date information regarding program requirements and designation progress.

If you previously used LOMANET to access LOMA's professional designation programs, note that these courses and all student records are now available through our enhanced learning system. For details on accessing this system, see page 24, or check it out at [learning.loma.org](http://learning.loma.org).

## Fellow, Life Management Institute (FLMI) and Associate, Life Management Institute (ALMI)

The Fellow, Life Management Institute (FLMI) program is a 10-course professional designation program that provides an industry-specific business education in the context of the life insurance and annuity industry. Established in 1932, the FLMI program is the world’s largest university-level education program in insurance and financial services.

**Level I:** Provides need-to-know information about insurance products and operations so employees quickly gain confidence, serve the customer effectively, and contribute to company success

**ALMI:** Provides job-relevant knowledge about the core insurance functions and strengthens business and financial acumen

**FLMI:** Teaches advanced insurance and financial concepts to build a deeper understanding of the insurance business

All courses leading to the ALMI are available in two formats – as a Highly Interactive Online course with integrated modularized exams, or as a Course Portal with a proctored end-of-course exam. The upper level FLMI courses are only available in the Course Portal format with a proctored end-of-course exam. See Page 28 for more information.

### ALMI

The five-course ALMI program consists of:

- LOMA 280 or LOMA 281
- LOMA 290 or LOMA 291
- LOMA 301 or LOMA 302
- LOMA 307 or LOMA 308
- LOMA 320 or LOMA 321

### FLMI

The five FLMI-level courses cover “big picture” business topics important to insurance professionals and managers. In general, these courses also cover quantitative and financial concepts in greater depth. LOMA recommends a course progression that begins with Level I followed by the ALMI level before enrolling in courses in the FLMI level.

## Associate, Life Management Institute (ALMI) and Fellow, Life Management Institute (FLMI)

Required courses									
Level I		ALMI			FLMI				
Insurance Principles	Insurance Operations	Insurance Administration	Business & Financial Concepts <sup>1</sup>	Marketing	Law <sup>1</sup>	Management <sup>1</sup>	Investments <sup>1</sup>	Accounting	Risk Management & Product Design
LOMA 280 or LOMA 281	LOMA 290 or LOMA 291	LOMA 301 or LOMA 302	LOMA 307 or LOMA 308	LOMA 320 or LOMA 321	LOMA 311	LOMA 335	LOMA 357	LOMA 361	LOMA 371
Level I: LOMA awards a personalized certificate to learners upon successful completion of LOMA 280/281 and LOMA 290/291.		Level 1 plus the ALMI courses are required to earn the ALMI designation.							
Learners must complete <b>ALL</b> required courses to earn the FLMI designation.									

<sup>1</sup> Learners who have credit for the discontinued courses shown below automatically receive FLMI credit for the applicable course category shown below.

Discontinued Course	Course Category
LOMA 351 LOMA 310, 315, or 316 LOMA 330 LOMA 340 or 356	Business & Financial Concepts Law Management Investments
Learners may be eligible for credit for other discontinued courses. Check your designation progress at <a href="http://learning.loma.org">learning.loma.org</a> .	

## Fellow, Secure Retirement Institute (FSRI) and Associate, Secure Retirement Institute (ASRI)

The Fellow, Secure Retirement Institute (FSRI) is a self-study designation program for industry professionals working in the retirement industry. Designed specifically for employees in insurance companies, asset management firms, distribution organizations, and recordkeeping companies, this comprehensive professional development curriculum covers the entire retirement planning and income marketplace. The FSRI will help companies ensure that their employees have the knowledge and skills to support retirement plans and products, deliver effective service and solutions to clients and advisors, and address the challenges and opportunities presented by the evolving retirement marketplace.

**Level 1 (Certificate Level)** consists of three courses that provide an overview of the retirement marketplace and a strong foundation in retirement principles, products, and planning. A **Certificate in Retirement Essentials** is awarded upon completion of these three courses.

**Level 2 (ASRI)** consists of three courses that teach advanced concepts in generating successful retirement outcomes and the application of retirement industry

knowledge to marketing, business acquisition, administration/operations, service, and other functions that support the business. Learners who complete Level 1 and Level 2 will earn the **Associate, Secure Retirement Institute (ASRI)** designation.

**Level 3 (FSRI)** delivers knowledge of broad challenges facing society and the retirement industry, as well as strategic approaches for meeting these challenges, to equip employees for problem solving, innovation, and advancement in their careers. Learners who complete Levels 1, 2, and 3 will achieve the **Fellow, Secure Retirement Institute (FSRI)** designation.

All courses leading to the ASRI are highly interactive online courses with integrated modularized exams. The final FSRI course features a blended learning approach that includes an interactive online component and a PDF text in a course portal with a proctored exam, as well as an assignment segment that challenges learners to demonstrate understanding and application of SRI 500 concepts.

LOMA recommends a course progression that begins with Level I followed by the ASRI level courses before enrolling in the FSRI course.

### Associate, Secure Retirement Institute (ASRI) and Fellow, Secure Retirement Institute (FSRI)

Required courses						
Level 1, Certificate in Retirement Essentials			Level 2, ASRI			Level 3, FSRI
SRI 111 Retirement Marketplace	SRI 121 Retirement Savings and Investments	SRI 131 Planning for a Secure Retirement	SRI 210 Successful Retirement Outcomes	SRI 220 Retirement Marketing and Business Acquisition	SRI 230 Retirement Administration	SRI 500 Transforming Retirement Security

### Important Note Regarding FSRI Credit for Other LOMA Courses

When LOMA introduced the FSRI curriculum in 2013, students with existing credit for specified courses within the Fellow, Financial Service Institute (FFSI) and Associate, Annuity Products Administration (AAPA) designation programs, as well as designees of the Fellow, Life Management Institute (FLMI), FFSI, or AAPA, were granted automatic (but limited) course credits in the FSRI program.

Now that the entire FSRI program curriculum is complete and available for enrollment, LOMA will begin phasing out these automatic credit opportunities in order to ensure that today's learners earn the Certificate in Retirement Essentials (Level 1) or the ASRI (Level 2) or FSRI designations with the most relevant and current content.

The table below describes the requirements that must be met in order to take advantage of automatic credit in the FSRI program.

Learners with existing credit for	Will receive automatic credit for	If they complete	By no later than
LOMA 286 or AAPA 273	SRI 111	The Certificate in Retirement Essentials (Level 1)	December 31, 2018
LOMA 305	SRI 131	The Certificate in Retirement Essentials (Level 1)	December 31, 2018
Learners who have earned the	Will receive automatic credit for	If they complete	By no later than
FFSI, AAPA, or FLMI designation	SRI 220	ASRI (Level 2 of the FSRI Program)	December 31, 2018

All future automatic credits in the FSRI program will be discontinued as of December 31, 2018. At that time, automatic credits that have not been secured by meeting the above requirements will be removed from the learner's Learning History.

## Associate, Customer Service (ACS)

Employees at all levels can benefit from the Associate, Customer Service (ACS) program. It is appropriate for anyone who interacts with internal or external customers on a regular basis.

The ACS program is designed to help you:

- Increase your knowledge of product lines
- Successfully manage customer relationships
- Exceed customers' expectations
- Improve your company's bottom line

The ACS program provides a course on the foundations of customer service, and the program's elective tracks allow you to focus your studies within a particular product area. Those pursuing the ACS may choose one of the following tracks to complete the designation:

- ACS — Life Insurance
- ACS — Property & Casualty (P&C)

**NOTE:** The ACS designation is awarded only for the first track completed.

### ACS — Life Insurance

Required courses			Elective courses — select two		
Customer Service	Insurance Principles	Insurance Operations/ Reinsurance Administration	Insurance Administration	Business & Financial Concepts	Marketing
ACS 100 or ACS 101	LOMA 280 or LOMA 281	LOMA 290 or LOMA 291 or ARA 440	LOMA 301 or LOMA 302	LOMA 307 or LOMA 308	LOMA 320 or LOMA 321
Learners must complete <b>THREE</b> required courses and <b>TWO</b> electives to earn the ACS designation.					



### ACS — Property & Casualty (U.S.)

Jointly sponsored by LOMA and The Institutes, the U.S. Property & Casualty track of the ACS program provides a solid understanding of customer service and how it affects property/liability, personal and commercial insurance, regulation, claims and more. Policies and procedures for LOMA-administered ACS courses are described in this *Catalog*. For information on enrolling for The Institutes courses, see the contact information below. To send proof of credit to LOMA, complete the form at [www.loma.org](http://www.loma.org).

#### The Institutes

Customer Service Department  
720 Providence Road  
Suite 100  
Malvern, PA 19355-3433  
**Tel:** 800-644-2101 / 610-644-2100  
**Fax:** 610-640-9576  
**E-mail:** [customerservice@theinstitutes.org](mailto:customerservice@theinstitutes.org)  
**Web site:** <http://www.theinstitutes.org>

### ACS — Property & Casualty (Canada)

Jointly sponsored by LOMA and The Insurance Institute of Canada (IIC), the Canadian Property & Casualty track of the ACS program provides a solid understanding of customer service and how it affects property/liability insurance, loss adjusting, underwriting, and agent/broker activities. Policies and procedures for LOMA-administered ACS courses are described in this *Catalog*. For information on enrolling for IIC courses, see the contact information below. To send proof of credit to LOMA, complete the form at [www.loma.org](http://www.loma.org).

#### The Insurance Institute of Canada

18 King Street East, 6th Floor  
Toronto, ON M5C 1C4  
**Tel:** 866-362-8585 / 416-362-8586  
**Fax:** 416-362-1126  
**E-mail:** [iicmail@insuranceinstitute.ca](mailto:iicmail@insuranceinstitute.ca)  
**Web site:** <http://www.insuranceinstitute.ca>

### ACS — Property & Casualty (U.S.)

Required courses			Elective courses — select two					
Customer Service	Property/Liability Principles	Personal/Commercial Insurance	Personal/Commercial Insurance	Insurance Regulation	Information Technology	Claims	Insurance Services	Reinsurance <sup>1</sup>
ACS 100 or ACS 101	AINS 21	AINS 22 or AINS 23	AINS 22 or AINS 23 (whichever was not taken as a required course)	IR 201	AIT 131 or CYBER 301	AIC 30	AIS 25	ARe 144
For details on the required and elective courses offered by The Institutes, visit <a href="http://www.theinstitutes.org">http://www.theinstitutes.org</a> .								
Learners must complete <b>THREE</b> required courses and <b>TWO</b> electives to earn the ACS designation.								

### ACS — Property & Casualty (Canada)

Required courses			Elective courses — select two				
Customer Service	Insurance Principles/Practices	Property/Liability Insurance	Property/Liability Insurance	Loss Adjusting <sup>2</sup>	Advanced Loss Adjusting <sup>2</sup>	Underwriting	Agent/Broker <sup>3</sup>
ACS 100 or ACS 101	C11 or C81 and C82	C12 or C13	C12 or C13 (whichever was not taken as a required course)	C110	C111	C120 or C121	C130 or C131
For details on the required and elective courses offered by the IIC, visit <a href="http://www.insuranceinstitute.ca">http://www.insuranceinstitute.ca</a> .							
Learners must complete <b>THREE</b> required courses and <b>TWO</b> electives to earn the ACS designation.							

<sup>1</sup> Learners who have credit for ARe 141 may receive ACS credit for the Reinsurance course.

<sup>2</sup> Learners who have credit for C15 or C17 may receive ACS credit for the Loss Adjusting or Advanced Loss Adjusting courses.

<sup>3</sup> Learners who have credit for C71 may receive ACS credit for the Agent/Broker course.

## Associate, Insurance Regulatory Compliance (AIRC)

Compliance is one of the most critical issues facing insurers today. LOMA's Associate, Insurance Regulatory Compliance (AIRC) program provides a comprehensive knowledge base of the complex issues surrounding state and federal regulation of the life insurance industry and products in the United States. Courses in this designation program are frequently updated to reflect evolving regulations. The AIRC program helps you understand:

- Compliance concepts, terms, processes, and regulatory requirements
- How states and the U.S. federal government regulate insurance companies
- What to expect during financial examinations and market conduct examinations
- What kinds of filings states need on life insurance products and annuities
- When, how, and why U.S. federal securities laws apply to the sale of financial products
- What specific regulations govern insurance, including life, pensions, annuities, credit insurance, and group products

## Certificate in Regulatory Compliance Essentials

LOMA recognizes that *everyone* in your organization – not just those working towards an AIRC designation – needs a solid foundation in Compliance. That's why learners who successfully complete AIRC 411 and AIRC 421 will be awarded the **Certificate in Regulatory Compliance Essentials**.

**NOTE:** Learners may not apply existing credit for AIRC 410 or AIRC 420 toward earning the Certificate. Our Contact Center representatives are available to help explain your options. Call us at 1-800-ASK-LOMA (option 1).

**New!**

New editions of AIRC 411 and AIRC 421 are now available!

## Associate, Insurance Regulatory Compliance (AIRC)

Required courses					
Principles	Insurance Operations	Law <sup>1</sup>	Marketing <sup>2</sup>	Compliance 1	Compliance 2
LOMA 280 or LOMA 281	LOMA 290 or LOMA 291	LOMA 311	LOMA 320 or LOMA 321	AIRC 411 <sup>3</sup>	AIRC 421 <sup>4</sup>
<b>LOMA awards a Certificate in Regulatory Compliance Essentials to learners upon successful completion of AIRC 411 and AIRC 421.</b>					
Learners must complete <b>ONE</b> course from each subject category to earn the AIRC designation.					

<sup>1</sup> Learners who have credit for LOMA 310 or LOMA 315 automatically receive AIRC credit for the Law course.

<sup>2</sup> Learners who have credit for LOMA 326 automatically receive AIRC credit for the Marketing course.

<sup>3</sup> Learners who have credit for AIRC 410 automatically receive credit for AIRC 411.

<sup>4</sup> Learners who have credit for AIRC 420 automatically receive credit for AIRC 421.

## Associate, Reinsurance Administration (ARA)

Reinsurance plays a vital role in the financial services industry. LOMA's Associate, Reinsurance Administration (ARA) program will help you grasp reinsurance principles, the importance of the written reinsurance agreement, and the administration and auditing of reinsurance business.

The ARA program describes:

- Key players and the reasons for using reinsurance
- Laws and regulations affecting reinsurance transactions
- Provisions of a reinsurance agreement and how they affect the administration of reinsurance transactions
- Processes involved in the administration of new business, in-force business, and terminations of reinsurance

**Important Note:** Effective January 1, 2018, the proctored examinations for ARA 440 will be available in I\*STAR and Prometric formats only. Paper exams will no longer be offered for this course.

### Associate, Reinsurance Administration (ARA)

Required courses					
Principles	Insurance Operations	Insurance Administration	Law/Compliance <sup>1</sup>	Accounting	Reinsurance Administration
LOMA 280 or LOMA 281	LOMA 290 or LOMA 291	LOMA 301 or LOMA 302	LOMA 311 or AIRC 411 or AIRC 421	LOMA 361	ARA 440
Learners must complete <b>ONE</b> course from each category to earn the ARA designation.					

<sup>1</sup> Learners who have credit for LOMA 310, LOMA 315, AIRC 410, or AIRC 420 automatically receive ARA credit for the Law/Compliance course.







# Designation Course Descriptions and Course Materials

All LOMA courses updated as needed to reflect the DOL fiduciary rule

New or revised course materials for English language courses are introduced on the first business day of a quarter. Your date of enrollment in the course dictates which materials you should study. Please check your materials carefully, particularly if you plan to purchase an optional printed textbook.

## How to Use This Section

This section provides brief course descriptions for all LOMA Designation courses. Courses are listed alphabetically by designation, and then numerically by course numbers.

- See page 24 for Course Enrollment and Access information.
- See page 75 for Course Fees.

**Now you can also take your search for designation courses online!** Detailed course descriptions and learning outcomes are also available in **LOMA's enhanced learning system**. Visit [www.loma.org](http://www.loma.org) for more information.

### ACS 100 Foundations of Customer Service

ACS 100 provides a comprehensive introduction to customer service in a financial services environment. The course explores the knowledge and skills employees need to understand and deliver exceptional customer service.

This course includes access to the Course Portal, as well as enrollment in a proctored examination.

**Foundations of Customer Service, Third Edition**  
(LL Global, Inc., 2015)

ISBN 978-1-57974-448-9

**Test Preparation Guide for ACS 100** (LL Global, Inc., 2015)  
ISBN 978-1-57974-449-4

**Optional printed textbook** (not included in enrollment fee)  
[See Order Form.](#)

**Foundations of Customer Service, Third Edition**  
(LL Global, Inc., 2015)

ISBN 978-1-57974-448-9

PBD Order # 100-10-15

### ACS 101 Customer Service for Insurance Professionals

ACS 101 uses a variety of media to provide a comprehensive overview of the role of customer service in insurance and financial services organizations and the skills service providers need to deliver exceptional customer service. The course describes important customer service functions, processes, and technologies and offers opportunities for students to learn and improve their listening, speaking and writing skills so that they can interact effectively with customers.

This course is delivered as a highly interactive online course, and non-proctored, end-of-module exams are integrated within the course.

### AIRC 411 **Updated!** The Regulatory Environment for Life Insurance

AIRC 411 discusses the compliance function in a life insurance company and how the state and federal governments regulate life insurance companies operating in the United States.

This course is delivered as a highly interactive online course, and non-proctored, end-of-module exams are integrated within the course.

### AIRC 421 **Updated!** Regulation of Life Insurance Products, Sales, & Operations

AIRC 421 explains state and federal regulation of life insurance and annuity product design in the United States. The course also describes the regulation of life company operations, including underwriting, claims, reinsurance, market analysis and examinations.

This course is delivered as a highly interactive online course, and non-proctored, end-of-module exams are integrated within the course.

All LOMA courses updated as needed to reflect the DOL fiduciary rule

### ARA 440

#### Reinsurance Administration

No Paper Exam

ARA 440 shows how reinsurance strengthens the insurance industry and increases the likelihood that insurance companies will have sufficient funds to pay anticipated claims. This course also discusses reinsurance principles, regulation of reinsurance, typical provisions in a reinsurance agreement, the administration of reinsurance business, and the importance of quality control for reinsurance.

This course includes access to the Course Portal, as well as enrollment in a proctored I\*STAR or Prometric examination.

#### Principles of Reinsurance, Second Edition

(LL Global, Inc., 2013)

ISBN 978-1-57974-414-4

#### Test Preparation Guide for ARA 440

(LL Global, Inc., 2013)

ISBN 978-1-57974-413-7

**Optional printed textbook** (not included in enrollment fee).

[See Order Form.](#)

#### Principles of Reinsurance, Second Edition

(LL Global, Inc., 2013)

ISBN 978-1-57974-412-0

PBD Order # 440-10-13



### LOMA 280

#### Principles of Insurance

LOMA 280 introduces the principles of insurance, the process of becoming insured, and the policyowner's contractual rights. The course includes information on the features of individual and group life insurance, health insurance, and annuity products.

This course includes access to the Course Portal, as well as enrollment in a proctored examination.

#### Principles of Insurance, Second Edition

(LL Global, Inc., 2017)

ISBN 978-1-57974-455-7

#### Test Preparation Guide for LOMA 280 (LL Global, Inc., 2017)

ISBN 978-1-57974-456-4

**Optional printed textbook** (not included in enrollment fee)

[See Order Form.](#)

#### Principles of Insurance, Second Edition

(LL Global, Inc., 2017)

ISBN 978-1-57974-455-7

PBD Order # 280-10-17

### LOMA 281

#### Meeting Customer Needs with Insurance and Annuities

Part of the Need 2 Know series, LOMA 281 uses a variety of media to teach principles of insurance, insurance products, and the policyowner's contractual rights. The course describes the features of individual and group life insurance and annuity products, and emphasizes how insurance companies serve customers and meet customer needs through the products they provide.

This course is delivered as a highly interactive online course, and non-proctored, end-of-module exams are integrated within the course.

All LOMA courses updated as needed to reflect the DOL fiduciary rule

## LOMA 290 **Updated!** Insurance Company Operations

LOMA 290 describes how life insurance companies operate in today's global environment: how they are organized, how they are managed, and the roles of functional and support units in developing, distributing, issuing, and administering life insurance and annuity products. Learners who take this course will better understand how an individual job fits into the entire scope of the company as well as the importance of each employee's contribution to overall organizational success.

This course includes access to the Course Portal, as well as enrollment in a proctored examination.

Enrollments purchased **before October 1, 2018** will be based on the following text assignment:

### Insurance Company Operations, Third Edition

(LL Global, Inc., 2012)  
ISBN 978-1-57974-380-2

### Test Preparation Guide for LOMA 290

(LL Global, Inc., 2012)  
ISBN 978-1-57974-381-9

**Optional printed textbook** (not included in enrollment fee)

[See Order Form.](#)

### Insurance Company Operations, Third Edition

(LL Global, Inc., 2012)  
ISBN 978-1-57974-380-2  
PBD Order # 290-10-12

Enrollments purchased **on or after October 1, 2018** will be based on the following text assignment:

### Insurance Company Operations, Fourth Edition

(LL Global, Inc., 2019)  
ISBN 978-1-57974-465-6

### Test Preparation Guide for LOMA 290

(LL Global, Inc., 2019)  
ISBN 978-1-57974-466-3

**Optional printed textbook** (not included in enrollment fee)

[See Order Form.](#)

### Insurance Company Operations, Fourth Edition

(LL Global, Inc., 2019)  
ISBN 978-1-57974-465-6  
PBD Order # 290-10-19

## LOMA 291 Improving the Bottom Line: Insurance Company Operations

Part of the Need 2 Know series, LOMA 291 uses a variety of media to teach operations, functions, and product development basics unique to the insurance organization. In addition, the course will teach that (1) a company's success depends on its operational efficiency and effectiveness, and (2) every employee has a role in ensuring the company's financial success.

This course is delivered as a highly interactive online course, and non-proctored, end-of-module exams are integrated within the course.

## LOMA 301 **Updated!** Insurance Administration

LOMA 301 provides a detailed discussion of the activities of insurance administration for individual and group life coverages, focusing on underwriting, reinsurance, claims, and customer service.

This course includes access to the Course Portal, as well as enrollment in a proctored examination.

Enrollments purchased **before July 2, 2018** will be based on the following text assignment:

### Insurance Administration, Fourth Edition

(LL Global, Inc., 2011)  
ISBN 978-1-57974-354-3

### Test Preparation Guide for LOMA 301

(LL Global, Inc., 2011)  
ISBN 978-1-57974-355-0

**Optional printed textbook** (not included in enrollment fee)

[See Order Form.](#)

### Insurance Administration, Fourth Edition

(LL Global, Inc., 2011)  
ISBN 978-1-57974-354-3  
PBD Order # 301-10-11

Enrollments purchased **on or after July 2, 2018** will be based on the following text assignment:

### Insurance Administration, Fifth Edition

(LL Global, Inc., 2018)  
ISBN 978-1-57974-461-8

### Test Preparation Guide for LOMA 301

(LL Global, Inc., 2018)  
ISBN 978- 978-1-57974-462-5

**Optional printed textbook** (not included in enrollment fee)

[See Order Form.](#)

### Insurance Administration, Fifth Edition

(LL Global, Inc., 2018)  
ISBN 978-1-57974-461-8  
PBD Order # 301-10-18

## LOMA 302 The Policy Lifecycle: Insurance Administration

LOMA 302 uses a variety of media to trace the lifecycle of a life insurance policy and explore insurance administration functions through real-world examples. Learners will closely examine the underwriting processes, customer service practices, reinsurance protocols, and claims evaluation procedures to gain an understanding of how insurers carry out a broad range of administrative activities. Case studies provide opportunities for learners to apply what they've learned to real-life scenarios.

This course is delivered as a highly interactive online course, and non-proctored, end-of-module exams are integrated within the course.

All LOMA courses updated as needed to reflect the DOL fiduciary rule

### LOMA 307 **Updated!** **Business and Financial Concepts for Insurance Professionals**

LOMA 307 introduces industry employees to basic financial concepts and terminology and relates these concepts to the business of insurance and company operations and profitability.

This course includes access to the Course Portal, as well as enrollment in a proctored examination.

Enrollments purchased *before January 2, 2018* will be based on the following text assignment:

**Business and Financial Concepts for Insurance Professionals** (LL Global, Inc., 2010)  
ISBN 978-1-57974-349-9

**Test Preparation Guide for LOMA 307**  
(LL Global, Inc., 2010)  
ISBN 978-1-57974-350-5

**Optional printed textbook** (not included in enrollment fee)  
[See Order Form.](#)

**Business and Financial Concepts for Insurance Professionals** (LL Global, Inc., 2010)  
ISBN 978-1-57974-349-9  
PBD Order # 307-10-10

Enrollments purchased *on or after January 2, 2018* will be based on the following text assignment:

**Business and Financial Concepts for Insurance Professionals, Second Edition**  
(LL Global, Inc., 2018)  
ISBN 978-1-57974-459-5

**Test Preparation Guide for LOMA 307**  
(LL Global, Inc., 2018)  
ISBN 978-1-57974-460-1

**Optional printed textbook** (not included in enrollment fee)  
[See Order Form.](#)

**Business and Financial Concepts for Insurance Professionals, Second Edition**  
(LL Global, Inc., 2018)  
ISBN 978-1-57974-459-5  
PBD Order # 307-10-18

### LOMA 308 **The Business of Insurance: Applying Financial Concepts**

LOMA 308 uses a variety of media to present basic economic, financial, and business concepts and practices related to insurance company management, operations, solvency, and profitability. The course utilizes extensive examples and exercises that enable learners to understand and apply important financial concepts and principles in their own work environments.

This course is delivered as a highly interactive online course, and non-proctored, end-of-module exams are integrated within the course.

### LOMA 311 **Business Law for Financial Services Professionals**

LOMA 311 presents the basic features and principles of the legal environment in which financial services companies around the world operate.

This course includes access to the Course Portal, as well as enrollment in a proctored examination.

**Business Law for Financial Services Professionals, Second Edition** (LL Global, Inc., 2012)  
ISBN 978-1-57974-396-3

**Test Preparation Guide for LOMA 311** (LL Global, Inc., 2012)  
ISBN 978-1-57974-397-0

**Optional printed textbook** (not included in enrollment fee)  
[See Order Form.](#)

**Business Law for Financial Services Professionals, Second Edition** (LL Global, Inc., 2012)  
ISBN 978-1-57974-396-3  
PBD Order # 311-10-12

All LOMA courses updated as needed to reflect the DOL fiduciary rule

## LOMA 320 Insurance Marketing

LOMA 320 covers marketing principles and the functions of marketing as an integral aspect of the life and health insurance industry.

This course includes access to the Course Portal, as well as enrollment in a proctored examination.

**Insurance Marketing, Second Edition** (LL Global, Inc., 2017)  
ISBN 978-1-57974-457-1

**Test Preparation Guide for LOMA 320** (LL Global, Inc., 2017)  
ISBN 978-1-57974-458-8

**Optional printed textbook** (not included in enrollment fee)  
[See Order Form.](#)

**Insurance Marketing, Second Edition**  
(LL Global, Inc., 2017)  
ISBN 978-1-57974-457-1  
PBD Order # 320-10-17

## LOMA 321 Marketing In Financial Services

LOMA 321 uses a variety of media to present basic marketing principles and to show how these principles are used in the financial services industry to satisfy customers' financial needs and to create profitable customer relationships. The course utilizes extensive examples and interactive exercises so that learners will be able to understand and apply the marketing principles in their own work environments.

This course is delivered as a highly interactive online course, and non-proctored, end-of-module exams are integrated within the course.

## LOMA 335 Operational Excellence in Financial Services

LOMA 335 presents financial services from the perspective of a company's operations management. This course focuses on practical techniques to accomplish the everyday tasks of providing financial services as efficiently as possible.

This course includes access to the Course Portal, as well as enrollment in a proctored examination.

**Operational Excellence in Financial Services**  
(LL Global, Inc., 2011)

ISBN 978-1-57974-378-9

**Test Preparation Guide for LOMA 335** (LL Global, Inc., 2011)  
ISBN 978-1-57974-379-6

**Optional printed textbook** (not included in enrollment fee)  
[See Order Form.](#)

**Operational Excellence in Financial Services**  
(LL Global, Inc., 2011)  
ISBN 978-1-57974-378-9  
PBD Order # 335-10-11

## LOMA 357 Institutional Investing: Principles and Practices

LOMA 357 provides an understanding of the investment regulatory environment and investing for life insurance companies and similar institutions. This course takes investments out of the black box! You'll learn about investment returns and risks, investment performance, and fund options for retirement products and other products with fund options. You'll also learn about investment types and strategies important for institutional investors, including fixed-income investments, real estate-related investments, equity investments, and derivatives.

This course includes access to the Course Portal, as well as enrollment in a proctored examination.

**Institutional Investing: Principles and Practices**  
(LL Global, Inc., 2013)

ISBN 978-1-57974-420-5

**Test Preparation Guide for LOMA 357** (LL Global, Inc., 2013)  
ISBN 978-1-57974-419-9

**Optional printed textbook** (not included in enrollment fee)  
[See Order Form.](#)

**Institutional Investing: Principles and Practices**  
(LL Global, Inc., 2013)  
ISBN 978-1-57974-418-2  
PBD Order # 357-10-13

All LOMA courses updated as needed to reflect the DOL fiduciary rule

### **LOMA 361** **Accounting and Financial Reporting** **in Life Insurance Companies**

LOMA 361 provides a broad exposure to financial and managerial accounting in life insurance companies, including the corporate and regulatory environment in which accounting functions occur.

This course includes access to the Course Portal, as well as enrollment in a proctored examination.

#### **Accounting and Financial Reporting** **in Life Insurance Companies** (LOMA, 2010)

ISBN 978-1-57974-338-3

#### **Test Preparation Guide for LOMA 361** (LOMA, 2010)

ISBN 978-1-57974-339-0

**Optional printed textbook** (not included in enrollment fee)  
[See Order Form.](#)

#### **Accounting and Financial Reporting** **in Life Insurance Companies** (LOMA, 2010)

ISBN 978-1-57974-338-3

PBD Order # 361-10-10

### **LOMA 371** **Risk Management and Product Design** **for Insurance Companies**

LOMA 371 describes technical product design for life insurance and annuities and the current state of risk management in insurance companies.

This course includes access to the Course Portal, as well as enrollment in a proctored examination.

#### **Risk Management and Product Design for Insurance** **Companies, Second Edition** (LL Global, Inc., 2012)

ISBN 978-1-57974-392-5

#### **Test Preparation Guide for LOMA 371**

(LL Global, Inc., 2012)

ISBN 978-1-57974-393-2

**Optional printed textbook** (not included in enrollment fee)  
[See Order Form.](#)

#### **Risk Management and Product Design for Insurance** **Companies, Second Edition** (LL Global, Inc., 2012)

ISBN 978-1-57974-392-5

PBD Order # 371-10-12

### **SRI 111** **Retirement Marketplace**

SRI 111 uses a variety of media to provide an overview of the retirement savings and income environment, with descriptions of the income needs and available resources of consumers during their pre-retirement and retirement years. It also identifies the companies operating in the retirement marketplace and the types of retirement services and solutions they provide. Other topics address the personal and financial risks people face before and during retirement, the relationships between risks and returns, and some of the techniques individuals can use to manage risks, as well as important concepts related to retirement income and savings, such as the time value of money and portfolio management.

This course is delivered as a highly interactive online course, and non-proctored, end-of-module exams are integrated within the course.

### **SRI 121** **Retirement Savings and Investments**

SRI 121 uses a variety of media to describe the range of individual and group products and plans that individuals use to save and/or provide an income for retirement, as well as their advantages and disadvantages and taxation. Various types of annuities, individual investments, individual retirement arrangements (IRAs), and employer-sponsored retirement plans are examined in detail.

This course is delivered as a highly interactive online course, and non-proctored, end-of-module exams are delivered within the course.

### **SRI 131** **Planning for a Secure Retirement**

SRI 131 uses a variety of media to describe the tools and other resources people can use to create a retirement plan that helps them reach their retirement goals, outlining steps in the planning process and behavioral factors that explain why people should, but often don't, create retirement plans. It also describes some of the important components of a comprehensive retirement plan, including decisions facing people as they near retirement and strategies they can use to accumulate assets and then turn those assets into a steady stream of retirement income.

This course is delivered as a highly interactive online course, and non-proctored, end-of-module exams are integrated within the course.

All LOMA courses updated as needed to reflect the DOL fiduciary rule

## SRI 210 Successful Retirement Outcomes

SRI 210 uses a variety of media to describe the components, considerations, and planning that are critical to attaining retirement income security, with key topics that address retirement readiness, sources of retirement income, developing and monitoring strategies for distributing assets in retirement and protecting those assets with health and long-term care protection. Armed with an understanding of these elements, learners in retirement organizations can better support company initiatives that achieve successful retirement outcomes for their participants and clients.

This course is delivered as a highly interactive online course, and non-proctored, end-of-module exams are integrated within the course.

## SRI 220 Retirement Marketing and Business Acquisition

SRI 220 uses a variety of media to introduce learners to the various parties in the marketing process and the steps involved in acquiring and growing retirement business in both retail and institutional markets. The course focuses on the distinctive features and needs of the retirement market, including market positioning, segmentation, and communications, provides detailed instruction on product and plan design across market segments, and describes various measures of success in the retirement market.

This course is delivered as a highly interactive online course, and non-proctored, end-of-module exams are integrated within the course.

## SRI 230 Retirement Administration

SRI 230 uses a variety of media to deliver knowledge about administration functions for existing retirement products, accounts, and plans. Topics include financial and non-financial transactions, ongoing management of retirement plans, reporting and disclosure, and customer service, as well as the regulatory, information technology, risk management, and quality management issues associated with these activities. While the course focuses on the functions performed by employees of retirement industry product and service providers, it also presents information from the perspectives of individuals (retail customers and plan participants), plan sponsors, and financial advisors.

This course is delivered as a highly interactive online course, and non-proctored, end-of-module exams are integrated within the course.

## SRI 500 Transforming Retirement Security

SRI 500 provides an overview of the current retirement system (Social Security, employer-sponsored retirement plans, individual retirement accounts, etc.) and the environment for delivering retirement security in the United States.

This course covers the emergence of the retirement system, current federal and state regulation, and future regulatory reform. It examines forces for change, public policy, megatrends that impact the retirement system, and also views the retirement system in a global context, describing retirement systems in selected countries. In addition to examining the achievements of the current retirement system, this course also explores the potential for driving innovation to enhance and possibly transform the retirement system of the future.

This course features an online interactive component and a PDF text with a proctored I\*STAR or Prometric exam, as well as an assignment segment that challenges learners to demonstrate understanding and application of course concepts. All study materials are accessible via the SRI 500 Course Portal.

**Transforming Retirement Security** (LL Global, Inc., 2017)  
— available in PDF format only  
ISBN 978-1-57974-452-6

**Test Preparation Guide for SRI 500** (LL Global, Inc., 2017)  
— available in Interactive Study Aid format only  
ISBN 978-1-57974-453-3

## UND 386 **No Paper Exam** Underwriting Life and Health Insurance

UND 386 introduces risk assessment principles applied to underwriting individual and group life and health insurance, including specialized policies and supplemental coverages.

This course includes access to the Course Portal, as well as enrollment in a proctored I\*STAR or Prometric examination.

**Life and Health Insurance Underwriting, Third Edition** (LL Global, Inc., 2013)  
ISBN 978-1-57974-417-5

**Test Preparation Guide for UND 386** (LL Global, Inc., 2013)  
ISBN 978-1-57974-416-8

**Optional printed textbook** (not included in enrollment fee).  
[See Order Form.](#)

**Life and Health Insurance Underwriting, Third Edition** (LL Global, Inc., 2013)  
ISBN 978-1-57974-415-1  
PBD Order # 386-10-13



# Short Online Courses and Course Collections

LOMA's library of short online courses and course collections cover various topics relating to insurance and financial services. Perfect for onboarding new employees or as a refresher for more experienced staff, LOMA's short online content will help boost productivity, performance, and success within your organization.

- Short — Most courses can be completed in less than an hour!
- Interactive — A variety of activities and demonstrations reinforce learning, and online quizzes and tests measure your learning quickly and provide instant feedback to keep you on track.
- Flexible — Learn at your own pace with 24/7 on-demand access to our courses.
- Convenient — No matter where you are, if you have Internet access, you can log in and learn!

## Featured Short Online Courses

- Creating a positive customer experience is an increasingly important differentiator — it can set you apart from the competition, sustain customer loyalty, and help achieve profitable growth for your company. **Impact Cx: The Quest** is an interactive, decision-based, gamified course that helps organizations create a unified customer-first mindset among all employees. It transforms employees into customer advocates who demonstrate empathy and sound judgment in meeting customer needs — and improving the overall customer experience — at key touchpoints in the customer journey.
- **DOL Fiduciary Basics for Employees** presents an unbiased, simple explanation of what the DOL fiduciary rule means to your company and your employees. This course provides foundational knowledge about the rule, establishes a common language and understanding within the organization, and helps employees understand the operational changes the company is making to comply with the new rule.
- Through our partnership with LOGiQ<sup>3</sup>, we offer a comprehensive **online training program for life underwriters**. This series of short online courses covers 200+ topics (medical, non-medical, and financial risks) in all areas of underwriting, and has been carefully designed to complement LOMA courses as well as the FALLU designation, offered by the Academy of Life Underwriting (ALU).

## Short Online Course Collections

Our short online collections combine several related short online courses — with one easy purchase, you get access to the entire collection. These collections provide an excellent way for new employees to get up to speed quickly, or for more seasoned employees to get a refresher or learn about a new area.

### Exceeding Customer Expectations: Customer Service Course Collection

Designed for those who want a solid introduction to customer service, this series of four short courses covers areas such as how to provide exceptional customer service, personal planning, priority lists, and handling conflicts with customers.

### Know Your Business: Annuities Course Collection

Providing a brief overview of annuities, this collection of five short courses focuses on the fundamental concepts of annuities and annuity operations.

### Know Your Business: Life Insurance Course Collection

This series of four short courses provides a solid introduction to the life insurance industry's principles and products. It covers areas such as characteristics of insurable risks, risk classification, types of life insurance, how different policies work, policy provisions, and policyowner rights.

### The Sales Support Collection: For Home Office Employees

Home Office employees who support the sales function are critical to ensuring that the sales process runs efficiently from beginning to end. They need to understand the “big picture” of the life insurance industry, as well as how they, their company, and its sales force work together to serve the customer. The seven courses in this collection focus on various life insurance products and the many functions that the Field and Home Office “touch.”

### The Sales Support Collection: For Field Office Employees

To do their sales support jobs effectively, Field Office employees need a solid knowledge of the life insurance industry, its products, and the insurance distribution and sales process. The seven courses in this collection provide an overview of the industry, such as products, distribution systems, and the key stages in a policy's lifecycle — planning, product development, application, underwriting, service, and claim administration.

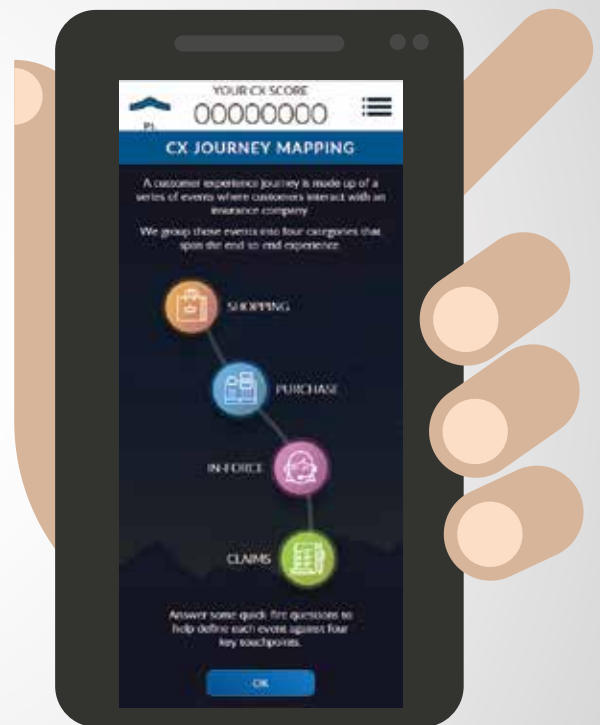


# Impacting the Customer Experience

Providing an outstanding customer experience is a key differentiator for insurers. LOMA's new online gamified course, **Impact Cx: The Quest**, is specifically designed to help all life insurance employees learn how they impact the customer experience, no matter their role within the company!

**Impact Cx: The Quest** is unlike anything you've seen before! Accessible from a phone, tablet, or PC, this exciting new course helps employees

- Explain what the customer experience is and why managing it is important to an organization and its employees
- Describe the key touchpoints on the customer journey
- Identify which department's actions affect the customer experience at each key touchpoint
- Describe the voice of the customer (VOC) and the data needed to capture it
- Define the customer journey for financial professionals and end consumers
- Give examples of ways that a company can improve the customer experience at one or more touchpoints
- Distinguish between a customer experience advocate and a problem solver
- Explain how companies measure the customer experience
- Explain how companies estimate the dollar value impact of touchpoints or pain points



**Make Impact Cx: The Quest part of your company's Customer Experience initiatives!**  
**Contact [membersolutions@loma.org](mailto:membersolutions@loma.org) to learn more.**





# Course Enrollment, Access, and Study Materials

## LOMA Takes Your Professional Education Experience Online!

Accessing LOMA's professional education programs and courses is now easier than ever before.

In our online learning system, find descriptions of our professional designation programs, professional designation courses, short online courses, and short online course collections. The online catalog within the learning system provides all of the course description information found in this *Catalog* and more — and it allows you to filter by category, key word, language, course type, and provider to help you easily select the learning offering that best meets your goals and learning preferences.

Log in to LOMA's learning system to access a wealth of information about LOMA courses and programs. As a registered user, you'll have access to product pricing information for your company. Plus, you'll be able to purchase course enrollments, access any courses you've enrolled in, view your learning history, and see your progress toward professional designations.

If you previously used LOMANET to enroll for and access LOMA's Designation courses or LOMALearn to enroll for LOMA's Short Online Courses or Course Collections, note that these courses and your student records are now available through our enhanced learning system. Check it out at [learning.loma.org](http://learning.loma.org).

### Using Your LOMA Learning Account

To unlock all the great features and benefits, simply log in to LOMA's learning system and get started. To maintain confidentiality, a login ID and password are required to access your learning account.

#### *If You Are a New User:*

- Registering on LOMA's learning system is easy and free! Visit [www.loma.org](http://www.loma.org), and follow the prompts to login and learn. From the learning system's login screen, click "Create Account." Complete the online registration form to create your account. Make sure to provide a valid e-mail address. Enrollment confirmations and other important study reminders are sent via e-mail.

**NOTE:** To receive your company's membership benefits of lower course enrollment fees, be sure to enter your company's Organization/Company ID in the online registration form. Contact your company's Ed Rep to request this information.

If you had a learning record in either of our previous systems — LOMANET or LOMALearn — LOMA's Help Desk can assist you in accessing your account. Call 1-800-ASK-LOMA (275-5662) (Option 1).

**TIP:** It is a good idea to check your account information in your LOMA learning account at least once per year to make sure your contact information is correct!

## Enrolling for Courses

Enrolling for courses through LOMA's learning system is as easy as 1-2-3!



### Log In to LOMA's Learning System

Go to [www.loma.org](http://www.loma.org). Follow the instructions to login to LOMA's learning system and create a new learning account or to access your existing account.



### Select Your Courses

All of LOMA's course offerings are listed in the system's Learning Catalog. Use the search filters to narrow your search by language, topic, course type, and more. Each course's description includes details about the course format, learning objectives, cost, and demos (when available).

After reviewing the course's description, click "Add to Cart" to enroll for the course. You can return to the catalog to continue searching for courses or to add additional items to your shopping cart.

Once you have selected all the items you would like to purchase, click on the shopping cart icon at the top of the screen to complete your purchase.

**NOTE to Ed Reps:** Ed Reps can also enroll students in courses using LOMA's learning system. To enroll more than 20 students at a time, contact LOMA's Office of the Registrar to learn about a time-saving enrollment feature.



### Complete Your Purchase

Review your shopping cart to make sure all of your selections are correct, then click "Check Out."

You must accept LOMA's "Terms and Conditions," then click "Buy Now" to complete your purchase. An enrollment confirmation will be e-mailed to you.

## Student Responsibilities

If you choose to participate as a student in LOMA education, you are responsible for:

- Knowing course and program requirements and keeping up with changes as described in LOMA's *Education & Training Catalog* and in LOMA's learning system
- Enrolling for the correct course(s) you wish to take to achieve your professional development goals
- Studying from the correct editions of all assigned study materials for each course in which you enroll
- Adhering to LOMA's rules and standards to guarantee the integrity of LOMA courses, programs, and designations
- Taking proctored examinations according to LOMA's official paper exam schedule and/or following the specific computerized examination guidelines set by your company and/or Prometric
- Adhering to all deadlines, Terms of Use, License Agreements, Honesty Statements, procedures, and regulations
- Reporting any cheating or violations of Terms of Use, License Agreements, Honesty Statements, procedures, or regulations to LOMA immediately

All LOMA course enrollments are considered individual enrollments, and are for your own personal educational purposes only. Use of any part of a LOMA course or course materials for any other purpose requires a separate license agreement from LOMA. Each course contains specific Terms of Use to which users are bound as participants in LOMA's education programs. Contact us at [education@loma.org](mailto:education@loma.org) to inquire about separate license agreements or to report violation of LOMA's Terms of Use.

### Accessing Online Study Materials

Once your purchase is complete, the courses you enrolled in will appear on your **“Upcoming Learning”** page, along with the expiration date of your course access period. To access the course, click on the course title in “Upcoming Learning.”

#### Short Online Courses

The access period for a short online course or short online course collection is **six months** from the date of enrollment. In order to receive credit for a short online course, you must successfully complete all examination components built into the online course during the course access period.

#### Highly Interactive Online Designation Courses

Study materials and integrated end-of-module examinations for highly interactive designation courses are available online. The access period for a highly interactive online designation course is **six months** from the date of enrollment. In order to receive credit for a highly interactive online designation course, you must successfully complete all examination components built into the online course during the course access period.

#### Course Portal Designation Courses

As a student enrolled in a Course Portal designation course, it is **your responsibility** to ensure that you study from the correct assigned materials. Enrollment in a designation course with a proctored exam requirement (I\*STAR, Prometric, or paper) typically includes access to all of the necessary study materials via an online Course Portal for **six months** from the date of enrollment. LOMA also offers most textbooks in a traditional printed format for an additional fee. (see *Purchasing Printed Study Materials* on page 27)

**NOTE:** Course Portal access periods for paper exam enrollments are associated with a paper examination cycle — May or November. Please see the chart of paper examination dates on page 76 for details.

A learner enrolled in a Course Portal course is entitled to print for personal use **one** copy of the PDF text and **one** copy of the PDF Test Preparation Guide. If you choose to print your study materials or to study offline via a PDF, be sure that your materials are current. The assigned study materials for each course are listed in the “Designation Course Descriptions” and Course Materials section beginning on page 15, as well as in the online Learning Catalog in LOMA’s learning system.

Past exams are not recommended as study aids, and are not available from LOMA or PBD Worldwide.

### Anticipating Curriculum Changes

When a new edition of assigned study materials for a proctored designation course is anticipated, the release date will be noted in the Designation Course Descriptions and Course Materials section of this *Catalog* (see page 15), as well as in the online Learning Catalog in LOMA’s learning system.

Changes in curriculum will be introduced on the first business day of a quarter (January, April, July, or October). After a course’s assigned study materials change, digital and print versions of those outgoing materials will only be available from LOMA or PBD Worldwide for six months, to allow students whose enrollments are based on those outgoing materials to complete their courses. However, any **new** enrollments in the course will be based on the new text assignment. Be aware that students enrolled in the same course may be studying from different materials, depending upon when they enrolled in the course. It is the **student’s responsibility** to study from the correct materials. Please contact LOMA’s Office of the Registrar if you have any questions.

### Extending Access for Designation Courses

If you have not completed your Designation program’s online course requirements or proctored examination requirements by the end of the course’s six-month access period shown in your student record, you may re-enroll to extend your course access for an additional six-month period.

For highly interactive online courses, re-enrolling allows you to retain your progress in the course, as long as the course’s materials have not been substantially revised since your original enrollment date. For Course Portal courses, re-enrolling extends your access to the Course Portal and allows you to select a new proctored exam date, as long as you **have not** already taken the proctored exam for the course. (See page 32 for information on retaking a proctored exam.)

Course extensions can also be used to

- Change the language of the proctored exam for which you are enrolled.
- Change the type of proctored exam enrollment between paper and I\*STAR. (Additional fees and restrictions may apply if changing to a Prometric exam type or rescheduling a Prometric exam. See page 29 for details.)

The cost for re-enrolling varies, depending upon when you re-enroll.

- If you re-enroll **within one month** of the end of your original course access period (or for the next paper exam cycle, if you were enrolled for a paper exam administration), you qualify for a **discounted course extension price of \$50**. The discounted price will automatically be reflected in your Shopping Cart when you re-enroll via LOMA's learning system.
- After the expiration of the discount period, you may re-enroll at the course's full price. This full price will automatically be reflected in your Shopping Cart when you re-enroll via LOMA's learning system.

### Students with Special Needs

LOMA makes every effort to accommodate the needs of students with special needs by granting permission for special arrangements on a case-by-case basis. Contact LOMA's Office of the Registrar for more details.

### Purchasing Printed Study Materials

Each course's detailed course description in the Learning Catalog in LOMA's learning system specifies the materials that are assigned for each LOMA course, and how to access those materials. Enrollment in most LOMA courses includes access to all assigned study materials, either within the online course itself, or via an online Course Portal.



Access to all assigned study materials is available via Course Portal for English — and most non-English — proctored designation courses. It is the **student's responsibility** to study from the correct printed study materials.

You may wish to purchase printed study materials to use as a desk reference. Printed study materials for most English language courses are sold at:

#### PBD Worldwide

Web site: [www.lomabookstore.com](http://www.lomabookstore.com)

Email: [LNH@pbd.com](mailto:LNH@pbd.com)

Tel: 800-887-3723 / 770-280-4178

Fax: 770-280-4150

When ordering print-related study materials, please include your LOMA Organization ID to receive member company pricing.

#### Shipping

Delivery of all in-stock items can be expected within three to ten business days from receipt of your order. All orders must be prepaid in U.S. dollars unless other arrangements are made directly with PBD Worldwide.

Due to the differing costs and regulations of the customs offices of each country, PBD Worldwide and LOMA cannot be responsible for additional customs charges incurred with orders. These costs are not included in the shipping or handling fees. Please take note of your country's customs regulations when placing an order.

Companies that want customized service arrangements should contact PBD Worldwide before placing orders for study materials. LOMA assumes no responsibility for any special arrangements made with PBD Worldwide concerning order handling.

#### Billing Inquiries for Print-Related Study Materials

If you have questions about a study materials invoice or billing-related matter, contact:

#### PBD Worldwide

P.O. Box 930108

Atlanta, Georgia 31193-0108

**Tel:** 800-887-3723 / 770-280-4178

**Fax:** 770-280-4150

**E-mail:** [LNH@pbd.com](mailto:LNH@pbd.com)



# Examinations

All LOMA courses include an examination component, and successful completion of examination components is required in order to receive credit for the course.

This section provides information about examination formats. For a complete list of English-language courses, study materials, examination length, and other course-specific details, see page 77.

## Highly Interactive Online Courses and Short Online Courses

LOMA's *highly interactive online* format professional designation courses and short online format courses include several short, non-proctored, end-of-module examinations, which are integrated into the course content as part of the learning experience. No separate exam enrollment is required. While these exam components are delivered in a non-proctored environment, system controls prevent learners from accessing the course materials while taking the exam components.

In order to receive credit for these courses, you must successfully complete all examination components built into the course during the course access period. (See page 32 for information on grades.)

## Course Portal Courses

Many of LOMA's professional designation courses include proctored exam requirements. These courses are often referred to as **Course Portal Courses** because all study materials for the courses are delivered via online course portals, and enrollment in the course includes access to the Course Portal as well as enrollment in the proctored examination.

Exams for these courses are administered in LOMA member organizations and at independent testing locations around the world, following LOMA's strict proctoring requirements.

At the time of enrollment in a course with a proctored exam requirement, you will select the type of environment in which you plan to take the exam. There are three types of exam options:

- Computerized exams delivered via LOMA's I\*STAR system at your company's testing center

- Computerized exams delivered at a Prometric Testing Center (U.S. & Canada only)
- Paper exams administered on specified examination dates, typically twice a year (see page 76 for the paper exam administration schedule)

Exams vary in length from two to three hours and in the number of questions, depending on language. For specific information about non-English courses, see the relevant language section in this *Catalog*.

## I\*STAR Exams

I\*STAR (Individually Scheduled Test and Results) is LOMA's Internet-based system for providing computerized exams. I\*STAR testing is available to students at companies that have installed the I\*STAR testing system.

Advantages of I\*STAR include the convenience and flexibility of year-round testing, as well as immediate online grade reporting.

Before taking an I\*STAR exam, you must be enrolled for the I\*STAR version of the course through LOMA's learning system.



### Important Information about I\*STAR Enrollments, Fees, Cancellations, and Testing:

- I\*STAR enrollments cannot be canceled.<sup>1</sup>
- If you do not sit for your exam before the end of your course access period (six months from date of enrollment), your course access will expire and all fees will be forfeited unless you purchase a course extension **within one month** of the end of your original course access period. To purchase a course extension, simply re-enroll in the course through LOMA's learning system. If you qualify for a discounted course extension, your fees will be adjusted automatically in your Shopping Cart. (See page 26 for more information about course extensions.) **LOMA will not refund enrollment fees if you do not sit for your examination.**
- Fees are nontransferable between paper and I\*STAR exams unless you purchase a course extension, and may be subject to enrollment deadlines.
- Your LOMA Test ID and password will be required at the time of your I\*STAR exam.
- A designation proctor must monitor I\*STAR testing. Specific I\*STAR procedures and room conditions are outlined for proctors in the I\*STAR Certification form available on [www.loma.org](http://www.loma.org)

### Prometric Exams

You may also take computerized exams at Prometric Testing Centers throughout the United States and Canada. Prometric offers students the flexibility of taking exams after regular business hours and on Saturdays.

**NOTE:** Prometric charges an administration fee of \$95, which is in addition to the course enrollment fee. See pages 75–76 for information about Fees.

### Important Information about Prometric Enrollments, Fees, Cancellations, and Testing:

- You must be enrolled for the Prometric version of the course through LOMA's learning system **at least 48 hours** before scheduling your exam appointment at a Prometric Testing Center.
- When you enroll for the course, through LOMA's learning system, you will receive an enrollment confirmation email. **You must print this confirmation and present it to the Prometric Testing Center when you arrive to take your exam.** If you lose this confirmation e-mail, you can access a copy in the “My Messages” section in your LOMA learning account.

- At least 48 hours after purchasing your enrollment, log on to [www.Prometric.com/LOMA](http://www.Prometric.com/LOMA) or call 1-800-998-5662 to schedule an exam appointment at a Prometric Testing Center. Prometric appointments are scheduled on a first-come, first-served basis, and seating is subject to availability. Appointments can fill up quickly, so schedule as early as possible to make sure that you can complete your exam before your course access period expires.
- Arrive at the Prometric Testing Center 30 minutes before your scheduled appointment. Bring the enrollment confirmation that was emailed to you at the time of enrollment, plus 2 forms of ID bearing your name and signature (one of which **MUST** include a recent photo<sup>2</sup>). Examples of valid forms of photo ID include: passport, driver's license with photo and signature, a state ID card, and a military ID. Acceptable forms of secondary ID include a credit card, an ATM card, or a citizenship card. Your name on the ID must exactly match the name on the enrollment confirmation email.

**If the ID does not match, you will not be allowed to take your exam and there will be no refund of your enrollment fees. Name discrepancies must be resolved at least 7 days prior to your appointment.**

- If you do not sit for your exam before the end of your course access period (six months from date of enrollment), your course access will expire and all fees will be forfeited unless you purchase a course extension **within one month** of the end of your original course access period. To purchase a course extension, simply re-enroll in the course through LOMA's learning system. If you qualify for a discounted course extension, your fees will be adjusted automatically in your Shopping Cart. (See page 26 for more information about course extensions. Also see page 30 for more details about rescheduling Prometric exams.) **LOMA will not refund enrollment fees if you do not sit for your examination.**
- Fees are nontransferable between paper and Prometric exams unless you purchase a course extension, and may be subject to enrollment deadlines.

<sup>1</sup> If, during the enrollment process, you enroll for the wrong course or type of exam by mistake, you must contact LOMA within 72 hours of your enrollment to have the error corrected at no charge.

<sup>2</sup> If you do not have a photo ID for religious purposes, you may present an ID with a physical description.

### Prometric Exam Rescheduling Requirements

To reschedule your appointment at a Prometric Testing Center, visit [www.prometric.com/loma](http://www.prometric.com/loma) or call 1-800-998-5662. Prometric's automated voice response system is available 24/7.

**NOTE: Rescheduling your appointment with Prometric does NOT automatically change your enrollment in the course through LOMA's learning system. Likewise, re-enrolling in a course through LOMA's learning system does NOT automatically change your scheduled Prometric exam appointment.** Before rescheduling an exam at a Prometric Testing Center, you must make sure you have not reached the end of your course access period in LOMA's learning system. If your course access period has expired, you must first log into LOMA's learning system and re-enroll in the course. See page 26 for more information about course extensions.

For each student who reschedules, arrives late, or does not appear for a scheduled test at a Prometric Testing Center, Prometric will charge the fees set forth in the table below. Please note that Monday through Saturday are considered business days.

Category	Reschedule Period	Prometric Rescheduling Fee
1	<b>30 or more days before test date.</b> As long as a student reschedules the exam appointment 30 or more days before the test date, there is no Prometric rescheduling fee.	None
2	<b>2 to 29 days before scheduled test date.</b> If a student reschedules the exam appointment in the period 2–29 days before the currently scheduled test date, Prometric will charge a \$35 rescheduling fee. The fee will be charged each time the exam appointment is rescheduled. The fee may be paid by Visa, MasterCard or American Express.	\$35 (Collected by Prometric when the exam appointment is rescheduled.)
3	<b>The full Exam/Testing fee for the rescheduled test will be charged if the student:</b> a) reschedules less than two days before test date, or b) fails to appear for a scheduled test, or c) arrives at the Prometric Testing Center more than fifteen (15) minutes after the scheduled start time for taking the test and is refused admission.	

### Paper Exams

Paper exams are typically offered in May and/or November. The "Paper Exam Schedule" on page 76 indicates the exam dates and times for each course. **All paper exams, regardless of language or location of testing, must be administered according to this schedule.**

Before taking a paper exam, you must be enrolled for the paper version of the course through LOMA's learning system. When enrolling, keep in mind that you cannot enroll

- For an exam scheduled on a day your company will be closed, e.g., a national or company holiday
- For more than one exam scheduled on the same day at the same time.

LOMA does not limit the number of exams you may take in each testing period. You are the best person to determine the number of exams you can prepare for in one cycle.

**Important Note:** Effective January 1, 2018, the proctored examinations for **ARA 440** and **UND 386** will be available in I\*STAR and Prometric formats only. Paper exams will no longer be offered for these courses.

### Important Information about Paper Enrollments, Fees, Cancellations, and Testing:

- Enrollments made by authorized member company students, independent students, and Ed Reps must meet LOMA's official enrollment deadlines in the list of "Key Dates" shown on the inside front cover of this *Catalog* to avoid additional fees. Please note, your company's enrollment deadlines may be earlier than LOMA's official enrollment deadlines.
- Enrollments may not be canceled for any reason after the official enrollment deadline.
- Enrollments are nontransferable between paper and I\*STAR or Prometric exams unless you purchase a course extension (see page 26).
- Enrollments are nontransferable between students or between courses. Switching courses without paying for the new course enrollment is prohibited. Credits and/or refunds will not be given for the course for which you initially enrolled.



- If you do not sit for your paper exam on the published exam administration date, your course access will expire and all fees will be forfeited unless you purchase a course extension for the next paper exam administration cycle, or unless you purchase a course extension for an I\*STAR or Prometric administration within one month of your originally scheduled paper exam administration date. To purchase a course extension, simply re-enroll in the course through LOMA's learning system. If you qualify for a discounted course extension, your fees will be adjusted automatically in your Shopping Cart. (See page 26 for more information about course extensions.) **LOMA will not refund enrollment fees if you do not sit for your examination.**

## Exam Procedures & Regulations

### Proctored Exams — I\*STAR, Prometric, and Paper

- You may be required to furnish photo ID when taking a proctored exam.
- All I\*STAR and Prometric exams must be taken according to the scheduling guidelines determined by your company and/or by Prometric.
- All paper exams must be taken according to LOMA's "Paper Exam Schedule." (See page 76.)
- Plan to arrive at the exam site 30 minutes before your exam begins. If you arrive after the scheduled starting time for your paper exam, the exam may not be accepted by LOMA for grading.
- "Official Exam/Proctor Instructions," mailed along with examinations to all paper exam proctors, must be followed.
- Students may not consult, discuss, review, or in any way use anyone else's answers or accept unauthorized assistance during any examination. Please note that LOMA uses specially designed software to detect possible cheating on LOMA exams.
- During the exam, students may not have in their possession any outside materials including, but not limited to, notes; textbooks; tables; charts; graphs; cell phones; pagers; Personal Digital Assistants (PDAs), e.g. Palm Pilots or BlackBerrys; or digital media players, e.g. iPods.
- Only calculators bearing the official LOMA logo are permitted in the exam room. The official LOMA calculator is sold through PBD Worldwide [PBD Order # CALC-01].
- Paper exam booklets must be returned to the proctors after the exam. The booklets will not be returned to students.
- Additional procedures, regulations, and information are posted at [www.loma.org](http://www.loma.org).

### Exam Question Challenges

If you believe a question on a paper, I\*STAR, or Prometric exam was misleading, unfair, or contained errors, you may submit an exam question challenge. All challenges are researched by LOMA staff.

- Challenges to **paper examinations** must be submitted within one week of the exam administration date. Deadlines for submitting challenges for paper examinations are found in the Key Dates list on the inside front cover of this *Catalog*.
- Challenges to **computerized (I\*STAR or Prometric) examinations** must be submitted within ten business days of your exam administration.

Guidelines for submitting exam question challenges are included in LOMA's official Exam Proctor instructions. Proctors or Ed Reps can fax exam questions challenge to 770-984-3742, or e-mail [education@loma.org](mailto:education@loma.org).

### End-of-Module Exams — Highly Interactive Online Courses

- You must accept and abide by the Honesty Statement included in each end-of-module examination for highly interactive online designation courses.
- You may not consult, discuss, review, or in any way use anyone else's answers or accept unauthorized assistance during any examination.
- During end-of-module exams, students must not refer to any outside materials, nor try to circumvent LOMA's system controls designed to prevent access to course materials while answering end-of-module exam questions.
- Any end-of-module exam questions that require the use of a calculator will include links to an online calculator approved for use.
- Additional procedures, regulations, and information are posted at [www.loma.org](http://www.loma.org).

### Violations of Exam Administration Procedures

To protect the integrity of LOMA designations while ensuring the credibility and rights of organizations and individuals participating in LOMA Programs, a due process procedure is used when violations of standards governing exam administration are suspected. The due process procedure involves:

1. Determining the existence of a possible violation
2. Investigating the suspected violation
3. Communicating the findings and sanctions imposed, if any, to the affected parties

The complete due process policy can be found on LOMA's Web site at [www.loma.org](http://www.loma.org).



# Grades, Credit, and Awards

Grades for any LOMA course that includes a scored examination are recorded on the Learning History page in your LOMA Learning record. This section highlights unique features of scoring by the type of course. Note that an Ed Rep in your organization can access your Learning History to view course progress and to assist you; however, for your privacy, Ed Reps are unable to view any numeric scores on your Learning History record.

## Short Online Courses

Many short online courses include a scored test integrated within the course. In most cases, a minimum passing score of 70 percent is required to successfully complete the course. You can take the exam for an online course as many times as desired during the course access period. The grade reflected on the Learning History page in your LOMA learning record will reflect the *highest* score of all exam attempts during the course access period.

## Highly Interactive Online Courses

LOMA's highly interactive online designation courses include a series of short, end-of-module tests which are integrated within the course. While these exam components are delivered in a non-proctored environment, system controls prevent learners from accessing the course materials while answering exam questions.

Successful completion of a highly interactive online course requires a minimum passing score of 70 percent on each end-of-module exam. When you successfully complete all end-of-module exams for your course, the course status in your Learning History in LOMA's learning system will show as COMPLETED.

## Course Portal Courses

The minimum passing score on proctored examinations (I\*STAR, Prometric, or paper) for Course Portal courses is 70 percent. Scores below 70 are listed only as F+ (within 10 points of passing) or F.

## Important Note about Grades for Prometric Exams

Prometric will provide you with an unofficial grade report when you complete your exam. Your official grade will be e-mailed to you within two business days. You may also log into your LOMA learning account and view your official score on the "Learning History" tab.

## Retake Policy

Students who receive a grade of F or F+ on a proctored examination (I\*STAR, Prometric, or paper exam) may retake the exam at a discounted cost. Retake fees vary by location — the cost of a retake will be automatically reflected in your shopping cart when you re-enroll. In order to receive the retake discount, the student must re-enroll for the course within **six months** after sitting for the original exam.

**NOTE:** This differs from a \$50 discounted Course Extension in that Course Extensions are only available if the student has not yet taken the proctored examination for the course, and if re-enrollment takes place *within the period specified for the type of enrollment (I\*STAR, Prometric, or paper)*. (See page 26 for details about course extensions.)

## Regrade Policy

You may request a regrade of your paper exam by submitting a request in writing within three months of the exam date. A fee of \$50 (U.S.) is required to manually regrade your exam. Fees will be refunded if LOMA discovers any errors were made during the initial grading process.

## Individual Student Performance Analysis!

Students who complete a proctored exam — I\*STAR, Prometric, or paper — will receive an e-mail containing their official grade on the exam, as well as an individual Performance Analysis Report showing their performance on each chapter of the assigned study materials. Note that this Performance Analysis Report is sent to students, but not to Ed Reps.

## Credit from Other Programs

LOMA grants course credit for some other insurance-related designation programs. To see the complete list of approved credit and the request form, visit [www.loma.org](http://www.loma.org). Students may apply to receive credit for up to three LOMA courses by virtue of having completed other related designation programs. The fee to apply for this credit is \$70 per course credit.

## Using LOMA Courses Toward Bachelor's and Master's Degrees

Many prestigious colleges and universities grant credit for LOMA courses, thus helping insurance and financial services professionals earn a college degree more quickly and easily than ever before.

The National College Credit Recommendation Service (National CCRS) evaluates LOMA courses and recommends semester credit hours for each course. To see what courses have been evaluated by National CCRS and download a Transcript Request Form, visit [www.loma.org](http://www.loma.org).

### CE Credit

Some states and provinces grant Life and Health agent continuing education (CE) credit for LOMA education courses — however, LOMA is **unable** to facilitate the CE application or submission process for learners. Each state and province has its own set of requirements for granting CE credit, and CE credit is not granted automatically; the learner must submit proof of course credit directly to the state or province upon completion of a LOMA course. Courses may not be approved for all categories of licenses, and all states and provinces reserve the right to deny CE credit at any time. Please check with your state or province to determine the requirements for CE credit application that apply to your individual situation.

## Awards

### Printable Awards

A “Notice of Completion” is available for any course you successfully complete. This printable Notice is accessible from the Learning History page in your LOMA learning record.

A “Certificate of Completion” is also available upon completion of all courses within a designation program or short online course collection. This printable Certificate is accessible from the Learning History page in your LOMA learning record.

### Printed Awards

LOMA provides printed, personalized awards upon completion of certain levels of LOMA Education Programs:

A Certificate for successful completion of:

- ALMI/FLMI Level 1
- Certificate in Retirement Essentials
- Certificate in Regulatory Compliance Essentials

A Diploma for successful completion of:

- any Associate designation
- any Professional designation
- any Fellow designation

Names appear on awards as they are listed on LOMA student records and do not include other designations or titles.

Awards earned each month are printed and mailed to company Ed Reps or directly to Independent Students. (Awards for the November paper examinations are sent in February and in August for the May paper exams.) LOMA cannot be responsible for lost awards in the event a student has moved and not updated the mailing address in LOMA's learning system.

Awards will arrive approximately ten weeks after the last course is posted in your Learning History. Designation credentials may be used immediately upon successfully completing program requirements.

Replacement awards can be ordered for \$35 (U.S.). To download a replacement award form, see [www.loma.org](http://www.loma.org).

### Awards With Honors/With Distinction

LOMA developed its line of highly interactive online course offerings in response to requests from member companies. These courses offer an alternative to the traditional LOMA designation courses, and they have been widely adopted throughout the industry. With the increased number of these course options, however, LOMA is unable to calculate a learner's true average score across all courses in a designation path. ***As a result, LOMA discontinued awarding designations “with honors” or “with distinction” in 2013.***



# International Programs

## Bahasa Indonesia Programs CPLHI (Certified Professional, Life & Health Insurance)

### 3 Program Dasar FLMI Dalam Bahasa Indonesia

CPLHI adalah Program pendidikan Professional LOMA dengan pengakuan International yang merupakan 3 program dasar FLMI (Fellow, Life Management Institute). Program CPLHI (Certified Professional, Life & Health Insurance) dapat ditempuh bagi siapa saja, khususnya para professional yang berkecimpung dalam bidang asuransi jiwa, kesehatan, anuitas, bancassurance, reasuransi, dan jasa keuangan.

**Untuk keterangan lebih lanjut serta pemesanan buku atau pendaftaran ujian silahkan hubungi:**

**Mrs. Bo Lee**

Coordinator, International Member Services

Phone: 770-984-6430 E-mail: [blee@loma.org](mailto:blee@loma.org)

### Designasi & Pengakuan CPLHI

Designasi CPLHI telah diakui secara resmi oleh Direktorat Asuransi & Jasa Keuangan, Departemen Keuangan Republik Indonesia melalui surat pengakuan no. S-086/LK.3/2003 tanggal 28 Februari 2003, demikian pula telah diakui oleh Asosiasi Asuransi Jiwa Indonesia (AAJI) sebagai Program Designasi Profesional Resmi yang diterjemahkan dalam Bahasa Indonesia guna peningkatan mutu sumber daya manusia Indonesia berskala global. Kesemua institusi tersebut diatas juga telah mengakui FLMI dan program pendidikan LOMA lainnya

yang ditawarkan dalam bahasa Inggris dan berbagai bahasa asing lainnya sebagai gelar profesi resmi dibidang asuransi jiwa, kesehatan dan anuitas. Untuk keterangan lebih lanjut tentang program terbaru kami, kunjungi: [www.loma.org](http://www.loma.org).

Untuk mendapatkan gelar CPLHI, seorang murid harus mengambil setidaknya satu pelajaran di dalam Bahasa Indonesia.

### 3 Kursus CPLHI

#### LOMA 280, Prinsip-prinsip Asuransi

Prinsip-prinsip dasar Asuransi Jiwa, Kesehatan dan Anuitas yang fundamental bagi segala kegiatan suatu perusahaan asuransi, reasuransi dan bancassurance termasuk penguraian berbagai produk asuransi yang paling banyak dipasarkan dan kelangsungan berbagai produk tersebut.

#### LOMA 290, Pengoperasian Perusahaan Asuransi

Pembahasan secara meluas berbagai cakupan disiplin spesialisasi di dalam pengoperasian perusahaan asuransi Jiwa, seperti: Aktuaria, Underwriting, Administrasi Klaim, manajemen investasi menyangkut informasi dan sebagainya, dan proses pengembangannya.

#### LOMA 301, Administrasi Asuransi

Penjelasan fungsi-fungsi administrasi, serta praktek-praktek dan prosedur yang diterapkan leh Perusahaan Asuransi dalam menjalankan Administrasi, baik Asuransi Perorangan atau Asuransi kumpulan, organisasi Departemen Underwriting, masalah-masalah hukum yang berkaitan dengan Reasuransi, Administrasi Klaim dan kegiatan Customer Service.

### Associate, Life Management Institute (ALMI)

Level I		ALMI		
Insurance Principles	Insurance Operations	Insurance Administration	Business & Financial Concepts	Marketing
LOMA 280 or LOMA 281*	LOMA 290 or LOMA 291*	LOMA 301 or LOMA 302*	LOMA 307 or LOMA 308*	LOMA 320 or LOMA 321*
Level I: LOMA awards a personalized certificate to learners upon successful completion of LOMA 280/281 and LOMA 290/291.		Level 1 plus the ALMI courses are required to earn the ALMI designation.		

\* These online interactive courses are available only in English.

### CPLHI (Certified Professional, Life & Health Insurance)

Course in Bahasa	Member	Non Member	Number of exam questions	Time limit to take exam (in hours)	What comes with the price?
	I*STAR	I*STAR			
LOMA 280	\$96	\$192	60	2	PDF of the textbook ONLY (no TPG) + I*STAR exam
LOMA 290	\$96	\$192	60	2	PDF of the textbook ONLY (no TPG) + I*STAR exam
LOMA 301	\$96	\$192	75	3	PDF of the textbook ONLY (no TPG) + I*STAR exam

Students can obtain the CPLHI designation by taking LOMA 280 (or 281\*), LOMA 290 (or 291\*) and LOMA 301 (or 302\*). Please note that the courses marked with an \* are available in English only. At least, one of the 3 required courses must be taken in Bahasa Indonesia in order to obtain the CPLHI designation.

These prices are valid for LOMA's courses in BAHASA INDONESIA only.

## 2018年LOMA中文教育培训 资格认证课程目录及介绍

2018年，国际金融保险管理协会（LOMA）继续向大中华地区推出以下各类中文认证课程：

➤ FLMI 寿险管理师 .....	36
➤ ALMI 准寿险管理师.....	36
➤ ACS 客户服务师.....	37
➤ 课程简介及教材信息.....	37
➤ LOMA网络中文课程 .....	40

如果您 对此目录的内容或信息有疑问，  
欢迎和我们联系，我们会随时为您提供帮助。  
LOMA的联系方式如下：

### LOMA

6190 Powers Ferry Road, Suite 600  
Atlanta, GA 30339, USA  
Phone: 770-984-3738  
Fax: 770-984-6420  
E-mail: [intl@loma.org](mailto:intl@loma.org)

欲查询其他更详细的信息，请访问  
[www.loma.org](http://www.loma.org) 网址。

### 英文版课程教材

#### PBD Worldwide

Atlanta, USA  
LOMA International Sales

电话： 770-280-4178  
传真： 770-280-4150  
电子邮件：[lomaintl@pbd.com](mailto:lomaintl@pbd.com)  
网址：[www.lomabookstore.com](http://www.lomabookstore.com)



## 中文FLMI教育培训课程 — 寿险管理师

自1932年以来，FLMI资格认证已经被全世界的保险、金融行业公认为衡量本行业员工专业水平的标准。自1998年初开始，LOMA逐年推出中文课程。中文FLMI教材出版以后，考生便可以选用中文参加已推出的FLMI中文课程的考试，并获得与通过相应英文课程考试同等效力的资格认证。

\* 已经通过 LOMA已停止使用的 LOMA 351, LOMA 310, LOMA 315, LOMA 316, LOMA 330, LOMA 340 和 LOMA 356课程考试的考生将自动取得这些课程新版本考试在FLMI专业资格认证中的学分。

### 准寿险管理师 (ALMI)

必修课程				
保险原理	保险公司的运作	保险行政业务管理	保险从业人员业务及财务理念	保险营销
LOMA 280 或 LOMA 281	LOMA 290 或 LOMA 291	LOMA 301 或 *LOMA 302	LOMA 307 或 *LOMA 308	LOMA 320 或 *LOMA 321
完成这两门课程后、会得到LOMA颁发的初级证书				
课程数目:五门必修课程				

### 寿险管理师 (FLMI)

必修课程									
Level 1		Level 2			Level 3				
保险原理	保险公司的运作	保险行政业务管理	保险从业人员业务及财务理念*	保险营销	金融服务的商业法*	金融服务的卓越运营*	投资原理与机构投资	人寿保险公司会计与财务编报	人寿保险公司偿付能力与获利能力管理
LOMA 280 或 LOMA 281	LOMA 290 或 LOMA 291	LOMA 301 或 *LOMA 302	LOMA 307 或 *LOMA 308	LOMA 320 或 *LOMA 321	LOMA 311	LOMA 335	LOMA 357	LOMA 361	LOMA 371
完成这两门课程后、会得到LOMA颁发的初级证书									
课程数目:十门必修课程									

\* 此课程只有英文版

## 中文ACS教育培训课程 — 客户服务师

LOMA设计的中文ACS客户服务师教育培训课程 专门培养具备专业知识和技巧的保险、金融业客户服务人才。ACS课程如下：

### 中文ACS教育培训计划

必修课程			选修课 — 选择其中两门		
客户服务基础	保险原理	保险公司的运作	保险行政业务管理	保险从业人员业务及财务理念	保险营销
ACS 100 或 *ACS 101	LOMA 280 或 LOMA 281	LOMA 290 或 LOMA 291	LOMA 301 或 *LOMA 302	LOMA 307 或 *LOMA 308	LOMA 320 或 *LOMA 321
请注意:考生必需完成以上三门必修课和两门选修课才可以获得ACS教育培训计划 — 客户服务师的认证					

\* 此课程只有英文版

## 课程简介及教材信息

### 中文LOMA 280 保险原理

LOMA 280介绍了保险原理，被保险人的保险过程和保单所有人的权益。这套教材同时也包括了个人和团体人寿、健康保险以及年金的内容和特点。

#### 繁体

《保险原理》

出版时间：2011年12月 ISBN: 978-1-57974-384-0

《LOMA280应试指南 保险原理》

出版时间：2011年12月 ISBN: 978-1-57974-385-7

#### 简体

《保险原理》

出版时间：2011年12月 ISBN: 978-1-57974-382-6

《LOMA280应试指南 保险原理》

出版时间：2011年12月 ISBN: 978-1-57974-383-3

### 中文LOMA 281 满足客户的需求：保险与年金

这是高度互动的在线课程。多媒体包括视频，音频，字幕以及基于场景的学习。是保险和金融服务从业人员必读的基础课程。

该课程描述可保风险的特征，识别准投保人的风险等级。解释核保人员的角色，解释如何评估特定风险。讨论美国州政府和联邦政府在监管保险中扮演的角色，说明保险公司如何利用生命表为其产品定价，并描述死亡率对给付成本和保费率的影响。

### 中文LOMA 290 保险公司的运作

LOMA 290描述了寿险公司如何在当今全球经济环境中的运营：包括公司如何组建、如何管理、功能领域和支持领域对寿险产品和年金产品的开发、分销、签单、和保全。本教程的学习使用者能够了解每一个员工在公司整体中的位置，并认识每一个员工的贡献对公司整体成功的重要性。

#### 繁体

《保险公司的运作（第三版）》

出版时间：2012年8月 ISBN 978-1-57974-404-5

《LOMA 290应试指南 保险公司的运作（第三版）》

出版時間：2012年8月 ISBN 978-1-57974-405-2

#### 简体

《保险公司的运作（第三版）》

出版时间：2012年8月 ISBN 978-1-57974-402-1

《LOMA 290应试指南 保险公司的运作（第三版）》

出版时间：2012年8月 ISBN 978-1-57974-403-8

### 中文 LOMA 291 2018年4月隆重推出 提高公司的底线: 保险公司的运作

LOMA 291是须知课程（Need 2 Know）系列的一部分，本课程运用各种媒体手段详细地阐述了：公司运作、功能领域、和产品开发等保险公司特有的基础知识。另外，本课程还教导读者：（1）公司的成功取决于其运营的效率 and 效益，（2）每位员工都是公司总体财务成功

不可或缺的一部分。LOMA 291是高度互动的在线课程，每个单元的最后一部分都是本单元的考试，不需要监考，考试成绩在考试结束以后自动产生。

## 中文LOMA 301 保险行政业务管理

LOMA 301阐述了个人和团体人寿、健康保险和年金行业中的行政管理机制，着重描述了核保、再保险理赔和保单所有人服务。

### 繁体

- 《保险行政业务管理》(第二版)  
出版时间：2008年10月 ISBN 978-1-57974-331-4
- 《保险行政业务管理应试指南》(第二版)  
出版时间：2008年10月 ISBN 978-1-57974-333-8

### 简体

- 《保险行政业务管理》(第二版)  
出版时间：2008年10月 ISBN 978-1-57974-330-7
- 《保险行政业务管理应试指南》(第二版)  
出版时间：2008年10月 ISBN 978-1-57974-332-1

## 中文LOMA 307 保险从业人员业务及财务理念

旨在帮助员工学习与保险公司运作有关的基本财务概念。LOMA 307有助于员工清楚理解影响保险公司盈利能力的关键经济和财务指标。

### 繁体

- 《保险从业人员业务及财务理念》  
出版时间：2011年2月 ISBN 978-1-57974-370-3
- 《LOMA307应试指南 保险从业人员业务及财务理念》  
出版时间：2011年2月 ISBN 978-1-57974-371-0

### 简体

- 《保险从业人员业务及财务理念》  
出版时间：2011年2月 ISBN 978-1-57974-368-0
- 《LOMA307应试指南 保险从业人员业务及财务理念》  
出版时间：2011年2月 ISBN 978-1-57974-369-7

## 中文LOMA 311 金融服务领域的商业法

LOMA 311这一课程涵盖了适合全球金融保险服务公司使用的基本法律及原理。

### 繁体

- 《金融服务领域的商业法》  
出版时间：2008年1月 ISBN 978-1-57974-327-7
- 《金融服务领域的商业法应试指南》  
出版时间：2008年1月 ISBN 978-1-57974-328-4

### 简体

- 《金融服务领域的商业法》  
出版时间：2008年1月 ISBN 978-1-57974-325-3
- 《金融服务领域的商业法应试指南》  
出版时间：2008年1月 ISBN 978-1-57974-326-0

## 中文LOMA 320 保险营销

LOMA 320从人寿、健康保险业的整体需要,介绍了市场的原理和市场的功能。

### 繁体

- 《保险营销》  
出版时间：2010年8月 ISBN 978-1-57974-360-4
- 《LOMA320保险营销应试指南》  
出版时间：2010年8月 ISBN 978-1-57974-361-1

### 简体

- 《保险营销》  
出版时间：2010年8月 ISBN 978-1-57974-358-1
- 《LOMA320保险营销应试指南》  
出版时间：2010年8月 ISBN 978-1-57974-359-8

## 中文 LOMA 335 金融服务的卓越运营

LOMA 335以公司运营管理为视角阐述了金融服务。这一课程着眼于完成日常工作任务的实用技能，教导专业人士以尽可能卓有成效的方式提供金融领域的客户服务。

### 繁体

- 《金融服务的卓越运营》  
(LOMA, 2014) ISBN 978-1-57974-426-7
- 《LOMA335应试指南 金融服务的卓越经营》  
(LOMA, 2014) ISBN 978-1-57974-427-4

### 简体

- 《金融服务的卓越运营》  
(LOMA, 2014) ISBN 978-1-57974-428-1
- 《LOMA335应试指南 金融服务的卓越经营》  
(LOMA, 2014) ISBN 978-1-57974-429-8



## 中文 LOMA 357 机构投资：原理与实务

LOMA 357 深入探讨了投资的监管环境、寿险公司和其它类型公司的投资环境。这一课程昭示了黑箱作业的投资，使读者不仅可以藉此了解投资的风险与回报、投资的表现、和退休产品的基金选项，而且可以藉此了解投资的类型、和机构投资策略的重要性、包括固定收入型投资、不动产型投资、权益型投资和投资衍生工具。

### 繁体

《机构投资：原理与实务》  
(LOMA, 2015) ISBN 978-1-57974-437-3

《LOMA357应试指南 机构投资：原理与实务》  
(LOMA, 2015) ISBN 978-1-57974-438-0

### 简体

《机构投资：原理与实务》  
(LOMA, 2015) ISBN 978-1-57974-439-7

《LOMA357应试指南 机构投资：原理与实务》  
(LOMA, 2015) ISBN 978-1-57974-440-3

## 中文 LOMA 361 人寿保险公司会计与财务编报

LOMA 361详细地介绍了人寿保险公司会计和财务的类别和不同的使用方法，并讨论了人寿保险公司的财务报表的记录和应用。本书还介绍了资产会计，负债会计，资本盈余会计和收益会计，并全面地探讨了各类预算形式，预算的用途及制定。

### 繁体

《人寿保险公司会计职能和管理会计》  
出版时间：2003年11月 ISBN 1-57974-221-1

《人寿保险公司财务会计和编报要求》  
出版时间：2003年11月 ISBN 1-57974-222-X

《人寿保险公司会计和财务编报应试指南》  
出版时间：2003年11月 ISBN 1-57974-223-8

### 简体

《人寿保险公司会计职能和管理会计》  
出版时间：2003年11月 ISBN 1-57974-218-1

《人寿保险公司财务会计和编报要求》  
出版时间：2003年11月 ISBN 1-57974-219-X

《人寿保险公司会计和财务编报应试指南》  
出版时间：2003年11月 ISBN 1-57974-220-3

## 中文 LOMA 371 人寿保险公司偿付能力与获利能力管理

人寿保险公司偿付能力与获利能力管理 LOMA 371介绍了直接影响金融服务机构的盈利和偿付能力的产品设计和资本管理等诸多重要的课题。

### 繁体

《保险公司风险管理与产品设计》  
出版时间：2009年11月 ISBN 978-1-57974-343-7

《LOMA371应试指南 保险公司风险管理与产品设计》  
出版时间：2009年11月 ISBN 978-1-57974-344-4

### 简体

《保险公司风险管理与产品设计》  
出版时间：2009年11月 ISBN 978-1-57974-341-3

《LOMA371应试指南 保险公司风险管理与产品设计》  
出版时间：2009年11月 ISBN 978-1-57974-342-0

## 中文 ACS100 客户服务基础

ACS100阐述了客户服务的基本原理和基本策略，介绍了客户服务型的企业文化，建立了客户服务评估的标准，还强调了培养具有奉献精神的客户服务员工的重要性。

### 繁体

《客户服务基础》  
出版时间：2003年1月 ISBN 1-57974-178-9

《客户服务基础应试指南》  
出版时间：2003年1月 ISBN 1-57974-180-0

### 简体

《客户服务基础》  
出版时间：2003年1月 ISBN 1-57974-177-0

《客户服务基础应试指南》  
出版时间：2003年1月 ISBN 1-57974-179-7

## LOMA 2018 年中文课程笔试时间表

2018 年春季					
考试开始时间	5月14号 星期一	5月15号 星期二	5月16号 星期三	5月17号 星期四	5月18号 星期五
上午9点	LOMA 280	LOMA 290	LOMA 301	LOMA 311	LOMA 320
下午1点	LOMA 335	LOMA 357	LOMA 307 ACS 100	LOMA 361	LOMA 371

2018 年秋季					
考试开始时间	11月5号 星期一	11月6号 星期二	11月7号 星期三	11月8号 星期四	11月9号 星期五
上午9点	LOMA 280	LOMA 290	LOMA 301	LOMA 311	LOMA 320
下午1点	LOMA 335	LOMA 357	LOMA 307 ACS 100	LOMA 361	LOMA 371

## LOMA在线中文课程

## 退休计划概述

为使读者全面了解相关内容，本课程概述了各种类型的个人退休计划和雇主资助的退休储蓄计划，包括：

- 传统个人退休账户与Roth个人退休账户
- 利润分享和股票分红计划
- 401(k)，403(b)和457 计划
- SEPs、SIMPLE IRAs和401 (k) 计划、Keogh计划

本课程的讨论包括退休计划的结构和运营、合规要求、税收优惠、给付方式的选择、以及用于计算计划给付额的方法；并比较了定额给付计划和定额分担计划的计算公式。

## 保险行业15分钟浏览

本课程专门为刚加入保险行业的新雇员设计，帮助他们尽快进入工作状态。透过短时间的学习，新雇员就可以很快地了解保险公司在为个人和家庭提供经济保护中所发挥的重要作用，并了解他们为之服务的保险公司在金融服务行业中所占的位置。同时，本课程还介绍了寿险产品以及各式各样的金融服务产品。

## 保险公司如何使用寿险赚钱

本课程能够帮助您了解保险公司（包括您的公司）如何将各种业务活动有机地组织起来以实现公司的总体目标。如果您能明确这些目标，您就能够明确如何为实现这些目标做出更多的贡献，使自己成为一名更好的雇员，在自己的职业生涯中发展进步。

## 卓越的客户服务

本课程重点探讨了在金融服务行业里提供优质服务的重要性；阐述了什么是优质服务、怎样才能提供优质服务。不论您是刚入行的员工，还是资深专业人士，这一课程都能加深您对客户服务的认知。

## 课程注册和学习资料

我们的网上 [Learning Catalog](#) 介绍了我们的专业资格认证计划、专业资格认证指定课程、以及短小精悍的在线课程。[Learning Catalog](#) 不仅提供了专业资格认证课程的介绍，还按照主题、语种、课程类型、以及进修计划帮助您选择最适合自己的学习目标和学习方法。

您虽然可以在我们的网站获得丰富的信息，但您一定要登录我们的进修学习系统(LMS)，以便获得更多的第一手数据。作为一名注册用户，您可以在我们的进修学习系统，了解产品的价格、注册课程的费用、使用已经注册的课程、查询您的进修学习记录、确定您专业资格认证的努力方向。

### 使用您开设的LOMA进修学习账户

您只要登录LOMA的进修学习系统，就可以享受这一系统的强大功能和诸多便利。为了安全起见，您必须申请一个登录ID和密码PS，才能建立和使用您的进修学习账户。

#### 如果您是新用户：

- 在LOMA的进修学习系统注册方便而且免费！请访问 [learning.loma.org](http://learning.loma.org)，点击login和learn。在LOMA的进修学习系统注册表接口，点击Create Account，完整填写在线注册表格，创建您的账户。请务必提供一个有效的电邮E-mail地址，因为注册确认以及其它重要信息均通过电子邮件寄送

注意：请在注册表格中输入您公司的ID，以便享受会员公司的价格优惠。请与贵公司的教育代表（Ed Rep）联系，获取贵公司的ID。

## 注册课程

### 第一步: 登录LOMA的进修学习系统

访问[www.loma.org](http://www.loma.org)，按照提示，登录LOMA的进修学习系统，创建新用户的账户。原来的LOMANET或LOMALearn用户，可以通过以前登录LOMANET或LOMALearn的ID，访问自己的账户。

### 第二步: 选择课程

LOMA的 [Learning Catalog](#) 介绍了LOMA的所有课程。您可以按照主题、语种、课程类型、以及进修计划来进行搜索。每门课程的描述都包括课程格式、学习目标、注册价格、和课程示范的详细信息。

选定课程以后，请点击Add to Cart来注册该课程。您可以返回[Learning Catalog](#)继续选择课程，并将其添加到Add to Cart中。

当您选择了您选定的所有课程以后，请点击屏幕顶部的购物车图示，以便完成课程注册。

教育代表（Ed Reps）须知：教育代表可以使用LOMA的的进修学习系统为考生注册课程。当为50名以上的考生注册时，请与LOMA的注册办公室（Office of the Registrar）联系，了解如何节省注册时间

### 第三步: 完成注册

请复查您的购物车，确保您选定的所有课程都正确无误。如果您有降低价格的促销码或优惠码，请点击Apply Promotional & Order Discount，确认降低价格以后，点击Checkout。

您必须接受LOMA的条款与条件（Terms and Conditions），然后点击Buy Now，来完成课程注册。完成课程注册以后，一封确认您注册的通知将通过电子邮件发送给您。

### 使用条款与条件

所有的LOMA课程注册都被视为个人的注册，只用于您个人的教育目的。将LOMA课程或课程数据的任何部分用于任何其它目的都必须从LOMA申请单独的许可协议。LOMA的每门课程都包含使用条款与条件，考生同意接受相关的条款与条件，才能使用LOMA的教育培训计划。请通过[education@loma.org](mailto:education@loma.org)与我们联系，了解许可协议的信息，也可以举报违反LOMA使用条款与条件的行为。

### 考生的责任

如果您选择LOMA的教育培训计划，您就是LOMA的考生。做为LOMA的考生，您的职责包括：

- 了解您注册的课程和相关教育培训计划的要求，了解《LOMA教育培训目录》和LOMA进修学习系统的说明
- 根据自己的职业发展目标，选择、注册相关的课程。
- 研修您注册课程的正确版本。
- 遵守LOMA的规则和标准，以保证LOMA课程、教育培训计划、和专业资格认证的公正水平
- 根据LOMA的正式安排，参加有人监考的笔试；或根据贵公司的规定，用计算机参加在线的考试。
- 严格遵守所有的截止日期、使用条款和条件、许可协议、诚信声明、考试程序、和监管法规。
- 如果发现舞弊或违法使用条款和条件、许可协议、诚信声明、考试程序、和监管法规的行为，立即向LOMA报告。

### 使用在线学习资料

您注册以后，您注册的课程将列于您账户的*Upcoming Learning* 页面，同时列明您使用该课程的失效日期。如果您计划使用您注册的课程，请点击列于*Upcoming Learning*页面的课程名称。

### 短小精悍的在线课程

短小精悍的在线课程的使用期限是从注册之日起以后的**6个月**。为了获得短小精悍在线课程的学分，您必须在规定的**6个月**以内，以在线考试的方式，通过设置于课程以内的所有考试。

### 高度互动的网上专业资格认证课程

高度互动的网上专业资格认证课程的学习数据和音像数据均在网上。高度互动的网上专业资格认证课程的使用期限是从注册之日起以后的**6个月**。为了获得高度互动的网上专业资格认证课程的学分，您必须在规定的**6个月**以内，以在线考试的方式，通过设置于课程以内的所有考试。

### 有人监考的专业资格认证课程

注册有人监考的专业资格认证课程以后，请务必研修指定教材的正确版本，**这是您的职责**。有人监考的专业资格认证课程的考试包括笔试和I \* STAR考试，其相关的所有学习资料均可以通过在线课程门户网站获得。其使用期限是从注册之日起以后的**6个月**。

- 注意：笔试课程门户的使用期限与笔试的时间安排相关。请参阅第\_\_页附录的LOMA笔试时间安排表。

注册有人监考的专业资格认证课程的考生有权打印一份PDF文本的课本和应试指南供考生个人使用。当您打印PDF文本的学习数据时，请确保打印数据的正确版本。每门课程的指定教材都列在《LOMA教育培训目录》的中文部分，以及网上的*Learning Catalog*之中。

过去的考试资料不能用于学习，LOMA不提供过去的考试资料。

## 专业资格认证课程的延期使用

如果您在6个月的期限之内没有完成您注册的、在线或有人监考的专业资格认证课程的学习，您可以重新注册，将您注册的课程资料使用期限延长6个月。

对于高度互动的网上专业资格认证课程来讲，重新注册可以使您保留原有的学习记录。对于有人监考的专业资格认证课程来讲，只要您尚未参加考试，重新注册可以使您选择新的有人监考的考试日期。

重新注册的费用因重新注册的时间不同而异。

- 如果您在6月的使用期限之后的**1个月内**重新注册，那么，您的重新注册费用就只需50美元。当您在LOMA的进修学习系统重新注册时，这一优惠价格便会自动反映在您的购物车中。
- 上述1个月的优惠期过后，您可以支付注册费用的全额来重新注册，获得额外的6个月的使用期限。当您在LOMA的进修学习系统重新注册时，这一全额费用便会自动反映在您的购物车中。

## LOMA中文教材及其考试

课程	会员			非会员			试卷 题目数	考试 时间
	非监考课程*	I*STAR	笔试	非监考课程*	I*STAR	笔试		
ACS 100		\$160	\$183		\$320	\$366	75	3
LOMA 280		\$105	\$125		\$210	\$250	60	2
LOMA 281	\$106			\$212				
LOMA 290		\$105	\$125		\$210	\$250	60	2
LOMA 291	\$106			\$212				
LOMA 301		\$105	\$125		\$210	\$250	75	3
LOMA 307		\$105	\$125		\$210	\$250	60	2
LOMA 311		\$105	\$125		\$210	\$250	75	3
LOMA 320		\$105	\$125		\$210	\$250	60	2
LOMA 335		\$105	\$125		\$210	\$250	60	2
LOMA 357		\$105	\$125		\$210	\$250	60	2
LOMA 361		\$105	\$125		\$210	\$250	75	3
LOMA 371		\$105	\$125		\$210	\$250	75	3

上述价格仅适用于LOMA的中文版课程。

课程注册费用因考场的不同而异。

\* 注册考试费用包括：课本及其应试指南的PDF版本

## Les programmes en Français

En tant que fournisseur leader de solutions d'apprentissage pour les organisations de services financiers du monde entier, LOMA propose une large gamme de produits et de services pour répondre à vos besoins en matière de formation et de développement professionnel. Outre notre programme phare FLMI, nous offrons des programmes relatifs au service à la clientèle, aux rentes, à la réassurance, à la conformité et à la gestion d'une agence.

### Programmes de désignation professionnelle

Depuis 1932, LOMA a décerné des désignations professionnelles dans le secteur de l'assurance et des services financiers. Chaque programme de désignation LOMA donne aux apprenants une large compréhension de l'industrie dans son ensemble et une appréciation de la façon dont ils peuvent contribuer au succès de leurs entreprises. Tous les programmes de désignation professionnelle de LOMA sont élaborés avec l'aide et le soutien d'experts de l'industrie et sont globalement reconnus comme étant pertinents et intéressants.

Les programmes FLMI, ALMI, et ACS sont offerts en français.

### Fellow, Life Management Institute (FLMI) et Associate, Life Management Institute (ALMI)

Le programme *Fellow, Life Management Institute* (FLMI) est un programme de désignation professionnelle de 10 cours qui fournit une éducation spécifique à l'industrie de l'assurance vie et des rentes. Créé en 1932, le programme FLMI est le plus grand programme d'éducation en assurance et services financiers de niveau universitaire au monde.

**Niveau 1:** Fournit des informations essentielles concernant les produits et les opérations d'assurance afin que les employés se sentent rapidement en confiance pour servir efficacement les clients, et contribuer au succès de l'entreprise

**ALMI:** Fournit des connaissances pertinentes sur le métier et les fonctions d'assurance et renforce la perspicacité financière et le sens des affaires

**FLMI:** Enseigne des concepts avancés de l'assurance et des services financiers pour développer une compréhension plus profonde du secteur de l'assurance

Les cours en français menant au certificat de niveau 1 sont disponibles en deux formats — en ligne en format interactif avec des examens intégrés dans les modules du cours, ou en format PDF sur le portail du cours avec un examen surveillé en fin de cours. Les autres cours du FLMI ne sont disponibles qu'en format PDF sur le portail du cours avec un examen surveillé en fin de cours.

### ALMI (Associate, Life Management Institute)

Le programme ALMI se compose de cinq cours:

- LOMA 280 (PDF) ou LOMA 281 (interactif en français)
- LOMA 290 (PDF) ou LOMA 291 (interactif en français)
- LOMA 301 (PDF) ou LOMA 302 (interactif en anglais)
- LOMA 307 (PDF) ou LOMA 308 (interactif en anglais)
- LOMA 320 (PDF) ou LOMA 321 (interactif en anglais)

Cours obligatoires				
Principes des assurances	Exploitation des compagnies	Administration de l'assurance	Concepts commerciaux et financiers	Marketing
LOMA 280 ou LOMA 281 (en français)	LOMA 290 ou LOMA 291 <sup>1</sup> (en français)	LOMA 301 ou LOMA 302 (en anglais)	LOMA 307 ou LOMA 308 (en anglais)	LOMA 320 ou LOMA 321 (en anglais)
Certificat de Niveau I				

<sup>1</sup> LOMA 291 sera disponible en français en 2018.

### FLMI (Fellow, Life Management Institute)

Les cinq cours du niveau FLMI couvrent des sujets importants qui donnent une vision d'ensemble aux professionnels et aux gestionnaires de l'assurance. En général, ces cours couvrent également des concepts quantitatifs et financiers plus en profondeur. LOMA recommande de commencer le programme par le Niveau 1, suivi de l'ALMI, avant de s'inscrire aux cours du niveau FLMI.

Cours obligatoires									
Niveau 1		Niveau 2			Niveau 3				
Principes des assurances	Exploitation des compagnies	Administration de l'assurance	Concepts commerciaux et financiers	Marketing	Droit des affaires	Gestion des organisations	Investissement	Comptabilité	Solvabilité/rentabilité
LOMA 280 ou LOMA 281 (en français)	LOMA 290 ou LOMA 291 <sup>1</sup> (en français)	LOMA 301 ou LOMA 302 (en anglais)	LOMA 307 ou LOMA 308 (en anglais)	LOMA 320 ou LOMA 321 (en anglais)	LOMA 316	LOMA 335	LOMA 356 ou LOMA 357 (en anglais)	LOMA 361	LOMA 371
Certificat de Niveau I									

<sup>1</sup> LOMA 291 sera disponible en français en 2018.

### ACS (Associate, Customer Service)

À tous les niveaux de l'organisation, les employés peuvent bénéficier du programme Associate, Customer Service (ACS). Il est approprié pour toute personne qui interagit régulièrement avec des clients internes ou externes.

Le programme ACS est conçu pour vous aider à :

- Augmentez votre connaissance des gammes de produits
- Gérer avec succès les relations avec les clients
- Surpasser les attentes des clients
- Améliorez la rentabilité de votre entreprise

Le programme ACS offre un cours sur les bases du service à la clientèle, et les pistes électives du programme vous permettent de concentrer vos études dans un domaine de produit particulier.

Cours obligatoires			Options — choisir 2 cours		
Service à la clientèle	Principes des assurances	Exploitation des compagnies	Administration	Concepts commerciaux et financiers	Marketing
ACS 100 ou ACS 101 (en anglais)	LOMA 280 ou LOMA 281 <sup>1</sup> (en français)	LOMA 290 ou LOMA 291 <sup>1</sup> (en français)	LOMA 301 ou LOMA 302 (en anglais)	LOMA 307 ou LOMA 308 (en anglais)	LOMA 320 ou LOMA 321 (en anglais)

<sup>1</sup> LOMA 291 sera disponible en français en 2018.

### S'inscrire aux cours

S'inscrire aux cours via le système d'apprentissage de LOMA est simple comme 1-2-3!



#### Connectez-vous au système d'apprentissage de LOMA

Visitez le site [www.loma.org](http://www.loma.org). Suivez les instructions pour vous connecter au système d'apprentissage de LOMA et créer un nouveau compte (nouveaux utilisateurs) ou accéder à votre compte à l'aide de votre ancien identifiant de connexion LOMANET ou LOMALearn.



#### Sélectionnez vos cours

Toutes les offres de formation de LOMA figurent dans notre catalogue. Utilisez les filtres de recherche pour affiner votre recherche par langue, sujet, type de cours, etc. La description de chaque cours comprend des détails sur le format du cours, les objectifs d'apprentissage, les coûts et les démos (si disponibles).

Après avoir examiné la description du cours, cliquez sur "Ajouter au panier" pour vous inscrire au cours. Vous pouvez revenir au catalogue pour poursuivre la recherche de cours ou ajouter des articles supplémentaires à votre panier.

Une fois que vous avez sélectionné tous les éléments que vous souhaitez acheter, cliquez sur l'icône du panier en haut de l'écran pour compléter votre achat.

**NOTE aux représentants LOMA:** Les représentants LOMA (ou Ed Reps) peut également inscrire les étudiants aux cours dans le système de LOMA. Pour inscrire plus de 20 étudiants à la fois, contactez le bureau du registraire de LOMA pour en savoir plus sur une fonctionnalité d'inscription qui vous fera gagner de temps.



#### Complétez votre achat

Passez en revue votre panier d'achat pour vous assurer que toutes vos sélections sont correctes, puis cliquez sur "Check Out".

Vous devez accepter les «Conditions générales» de LOMA, puis cliquez sur «Acheter» pour compléter votre achat. Une confirmation d'inscription vous sera envoyée par courriel.

## Le matériel d'étude

1. Depuis janvier 2010, le matériel d'étude pour les cours des programmes de formation LOMA en français est disponible en ligne sous forme de fichiers PDF. L'étudiant a accès aux fichiers PDF du matériel d'étude du cours voulu une fois inscrit à un examen.
2. **Le matériel d'étude qui n'a pas été publié par LOMA n'est pas disponible en ligne et doit toujours être acheté chez PBD Worldwide.** Cette liste inclut les manuels suivants (les suppléments et guides pour ces cours sont disponibles en ligne — voir tableau ci-après).
  - a. **LOMA 356** — Principes d'investissement et l'investissement institutionnel (2005)
3. Le matériel d'étude et les examens intégrés de fin de module pour les cours de désignation interactifs sont disponibles en ligne. La période d'accès à un cours de désignation interactif est de six mois à compter de la date d'inscription. Afin de recevoir un crédit pour un cours de désignation interactif, vous devez terminer avec succès tous les examens intégrés dans le cours durant la période d'accès au cours.
4. Les frais de reprise ci-dessous sont valables si un étudiant se réinscrit pour passer le même examen dans les 30 jours après l'échec de l'examen.
5. Pour savoir comment obtenir accès au matériel d'étude en ligne, veuillez contacter LOMA au 770-984-3741 ou par courriel à [frenchsupport@loma.org](mailto:frenchsupport@loma.org).



Cours	Frais pour les cours LOMA en français				Les fichiers PPDF suivants sont inclus avec les frais d'inscription	Examens		
	Tarif Réduit pour les Membres		Tarif pour les Non-membres			L'examen I*STAR est inclus avec chaque inscription	Nombre de questions	Limite de temps
	Frais	Frais de reprise	Frais	Frais de reprise				
LOMA 280	\$245	\$145	\$470	\$370	Manuel, Guide de préparation	60	2h	
LOMA 281	\$245	n/a	\$470	n/a	Matériel d'étude interactif en ligne	60 questions au total intégrées dans les examens de fin de module		
LOMA 290	\$245	\$145	\$470	\$370	Manuel, Guide de préparation	60	2h	
LOMA 291 <sup>1</sup>	\$245	n/a	\$470	n/a	Matériel d'étude interactif en ligne	60 questions au total intégrées dans les examens de fin de module		
LOMA 301	\$220	\$160	\$420	\$360	Manuel, Guide de préparation	75	3h	
LOMA 307	\$285	\$185	\$550	\$450	Manuel, Guide de préparation	60	2h	
LOMA 316	\$220	\$160	\$420	\$360	Manuel, Guide de préparation	75	3h	
LOMA 320	\$285	\$185	\$550	\$450	Manuel, Guide de préparation	60	2h	
LOMA 335	\$327	\$227	\$634	\$534	Manuel, Guide de préparation	60	2h	
LOMA 356	\$220	\$160	\$420	\$360	Guide de préparation	75	3h	
LOMA 361	\$220	\$160	\$420	\$360	Manuels, Guide de préparation	75	3h	
LOMA 371	\$220	\$160	\$420	\$360	Manuels, Guide de préparation	75	3h	
ACS 100	\$305	\$205	\$590	\$490	Manuel, Guide de préparation	60	2h	

<sup>1</sup> LOMA 291 sera disponible en français en 2018.

#### La surcharge Canadienne de \$20 est incluse dans ces tarifs.

La taxe GST doit être payée sur tout examen passé au Canada. LOMA n'encaisse pas la taxe GST. Les compagnies canadiennes et les étudiants indépendants doivent évaluer eux-mêmes la taxe qu'ils doivent.

Pour tous les autres frais, rendez vous à la page 77–78.

## Examens

Tous les cours de LOMA comprennent un examen, et la réussite de l'examen est requise afin de recevoir un crédit pour le cours.

Cette section fournit des informations sur les formats d'examen.

### Cours en ligne en format interactif

Le LOMA 281 et le LOMA 291 sont maintenant disponibles en français ! Ces cours interactifs comprennent plusieurs examens non surveillés en fin de module, intégrés dans le contenu du cours pour créer une expérience d'apprentissage unique. L'inscription séparée à l'examen n'est pas nécessaire.

Bien que ces examens soient livrés dans un environnement non surveillé, des systèmes de contrôle empêchent les apprenants d'accéder au matériel du cours lorsqu'ils sont dans le module d'examen.

### Cours traditionnels disponibles sur le portail de cours

Les examens des cours traditionnels des programmes FLMI, ALMI et ACS sont offerts sur I\*STAR. Les examens I\*STAR sont disponibles toute l'année et peuvent être passés au moment qui convient à l'étudiant et à la compagnie. L'inscription doit se faire en avance sur le système d'apprentissage de LOMA, [learning.loma.org](http://learning.loma.org), et l'étudiant obtient ses résultats immédiatement.

Les étudiants peuvent passer les examens I\*STAR dans leur propre compagnie si le système I\*STAR a été installé, ou ils peuvent aller dans un des centres I\*STAR du Canada. (Pour savoir comment obtenir I\*STAR dans votre compagnie, rendez-vous sur [www.loma.org](http://www.loma.org).)

Tous les examens sont sous forme de questions à choix multiples. Lorsque les examens sont passés en français, les diplômes et certificats sont en français d'office; pour les recevoir en anglais, il faut faire une demande à cet effet au préalable.

### Disponible en 2018 — Deux cours interactifs en français : LOMA 281 et LOMA 291 !

Les cours interactifs utilisent une approche intéressante, multimédia, qui comprend souvent audio, vidéo, et une méthode d'apprentissage fondée sur des mises en situation.

Pour avoir de plus amples renseignements au sujet des programmes de LOMA en français ou pour obtenir de l'aide, veuillez prendre contact avec le représentant LOMA de votre compagnie. (Les étudiants indépendants peuvent se rendre sur notre site Internet pour savoir comment s'inscrire à un examen.) Vous pouvez également communiquer directement avec LOMA en téléphonant au 770-984-3741, ou par télécopie au 770-984-6415

## LOMA 280

### Principes des assurances

LOMA 280 introduit les principes de l'assurance, le processus de devenir assuré, et les droits contractuels du titulaire de la police d'assurance. Le cours comprend des informations sur les caractéristiques de l'assurance vie individuelle et de groupe, assurance santé, et des produits de rente.

**Principes des assurances de personnes** (LOMA, 2011)

ISBN 978-1-57974-372-7

**Guide de préparation à l'examen — LOMA 280**

(LOMA, 2011)

ISBN 978-1-57974-373-4

## LOMA 281 **Disponible maintenant**

### Satisfaire les besoins des clients avec des produits d'assurance et de rente

Premier cours de la série Need 2 Know, le LOMA 281 utilise une variété de médias pour enseigner les principes de l'assurance, les produits d'assurance, et les droits contractuels du titulaire de la police d'assurance. Le cours décrit les caractéristiques de l'assurance-vie individuelle et collective et des rentes. Il met l'accent sur la façon dont les compagnies d'assurance servent leurs clients et répondent à leurs besoins par le biais des produits qu'elles fournissent.

Ce cours est offert en ligne en format interactif, et des examens de fin de module non surveillés sont intégrés dans le cours.

## LOMA 290

### Exploitation des compagnies d'assurance

LOMA 290 décrit comment les compagnies d'assurance vie fonctionnent dans l'environnement mondial d'aujourd'hui: comment elles sont organisées, comment elles sont gérées, et les rôles des unités fonctionnelles et de soutien dans le développement, la distribution, l'émission, et l'administration de l'assurance vie et des produits de rente. Les apprenants qui prennent ce cours comprendront mieux comment leur travail individuel s'inscrit dans l'ensemble du périmètre de l'entreprise ainsi que l'importance de la contribution de chaque employé à la réussite globale de l'organisation.

**Exploitation des compagnies d'assurance, 2<sup>nd</sup>e édition**

(LOMA, 2012)

ISBN 978-1-57974-400-7

**Guide de préparation à l'examen — LOMA 290**

(LOMA, 2012)

ISBN 978-1-57974-401-4

## LOMA 291 **Disponible maintenant**

### Améliorer les résultats: exploitation des compagnies d'assurance

Deuxième et dernier cours de la série Need 2 Know, LOMA 291 utilise une variété de médias pour enseigner les principes de base des opérations, de la richesse fonctionnelle et du développement de nouveaux produits propres aux compagnies d'assurance.

En outre, le cours enseignera que (1) le succès d'une entreprise dépend de son efficacité et de son efficacité opérationnelle, et que (2) chaque employé joue un rôle important pour assurer la réussite financière de l'entreprise.

Ce cours est offert en ligne en format interactif et des examens de fin de module non surveillés sont intégrés dans le cours.

## LOMA 301

### Administration de l'assurance

LOMA 301 fournit une analyse détaillée des activités de l'administration de l'assurance vie pour les couvertures individuelles et en groupe, en se concentrant sur la tarification, la réassurance, les réclamations, et le service client.

**Administration de l'assurance 3<sup>ème</sup> édition**

(LOMA, 2009)

ISBN 978-1-57974-319-2

**Guide de préparation à l'examen — LOMA 301**

(LOMA, 2009)

ISBN 978-1-57974-320-8

## LOMA 307

### Concepts commerciaux et financiers pour les professionnels de l'assurance

LOMA 307 présente aux employés de l'industrie les concepts financiers et la terminologie de base et relie ces concepts au domaine de l'assurance et à l'exploitation et à la rentabilité de l'entreprise.

**Concepts commerciaux et financiers pour les professionnels de l'assurance** (LOMA, 2011)

ISBN 978-1-57974-362-8

**Guide de préparation à l'examen — LOMA 307**

(LOMA, 2011)

ISBN 978-1-57974-363-5

**LOMA 316****Le droit des affaires pour les professionnels des services financiers (Canada)**

LOMA 316 présente les caractéristiques et les principes fondamentaux de l'environnement juridique dans lequel les sociétés de services financiers au Canada fonctionnent.

**Le droit des affaires pour les professionnels des services financiers — Canada** (LOMA, 2006)

ISBN 1-57974-301-3

**Guide de préparation à l'examen — LOMA 316** (LOMA, 2006)

ISBN 1-57974-302-1

**LOMA 320****Le marketing des assurances**

LOMA 320 couvre les principes de marketing et les fonctions de marketing comme partie intégrante de l'industrie de l'assurance vie et maladie.

**Le marketing des assurances** (LOMA, 2013)

ISBN 978-1-57974-430-4

**Guide de préparation à l'examen — LOMA 320** (LOMA, 2013)

ISBN 978-1-57974-431-1

**LOMA 335****L'excellence opérationnelle dans les services financiers**

LOMA 335 présente les services financiers du point de vue de la gestion opérationnelle. Ce cours se concentre sur les techniques pratiques qui permettent d'accomplir les tâches quotidiennes pour fournir des services financiers le plus efficacement possible.

**L'excellence opérationnelle dans les services financiers** (LOMA, 2015)

ISBN: 978-1-57974-441-0

**Guide de préparation à l'examen** (LOMA, 2015)

ISBN: 978-1-57974-442-7

**LOMA 356****Principes d'investissement et l'investissement institutionnel**

LOMA 356 fournit une compréhension de l'environnement d'investissement et les principes généraux de l'investissement dans les titres individuels et les portefeuilles de valeurs mobilières. Dans ce cours, vous apprendrez au sujet des rapports du rendement des placements, du suivi de la performance des investissements, du rendement des placements, et plus encore.

**Principes d'investissement et l'investissement institutionnel** (Pearson, LOMA, 2005)

ISBN 2-7440-7058-0

PBD numéro de stock : 356-F10-05

**Guide de préparation à l'examen — LOMA 356**

(LOMA, 2005)

ISBN 1-57974-237-8

**LOMA 361****Comptabilité et déclarations financières des compagnies d'assurances de personnes**

LOMA 361 fournit une vaste exposition à la comptabilité financière et de gestion dans les compagnies d'assurance vie, y compris l'environnement de l'entreprise et réglementaire dans lequel les fonctions de comptabilité se produisent.

**Fonction comptabilité et comptabilité de gestion dans les compagnies d'assurance vie** (LOMA, 2002)

ISBN 1-57974-163-0

**Comptabilité générale et exigences de communication de l'information financière dans les compagnies d'assurance vie** (LOMA, 2002)

ISBN 1-57974-164-9

**Guide PREP — FLMI 361** (LOMA, 2002)

ISBN 1-57974-165-7

**LOMA 371****Gestion en fonction de la solvabilité et de la rentabilité dans les compagnies d'assurances de personnes**

LOMA 371 décrit la conception de produits techniques pour l'assurance vie et des rentes et décrit l'état actuel de gestion des risques dans les compagnies d'assurance.

**Conceptions de produits : Assurance vie et rentes** (LOMA, 2002)

ISBN 1-57974-132-0

**Gestion de capital pour les compagnies d'assurance** (LOMA, 2002)

ISBN 1-57974-133-9

**Guide PREP — FLMI 371** (LOMA, 2002)

ISBN 1-57974-134-7

**ACS 100****Fondements du service à la clientèle**

ACS 100 présente une introduction globale au service à la clientèle dans l'environnement des services financiers. Le cours explore les connaissances et les compétences dont les employés ont besoin pour fournir un service à la clientèle exceptionnel.

**Fondements du service à la clientèle** (LOMA, 2016)

ISBN 978-1-57974-450-2

**Guide de préparation à l'examen—ACS 100** (LOMA, 2016)

ISBN 978-1-57974-451-9

## 한국어 FLMI 프로그램

FLMI, ALMI 및 ACS 프로그램이 한국어로 번역되고 있습니다. 엄격한 10개 과정으로 구성된 FLMI 프로그램은 보험 및 금융서비스 산업환경에서 종합 비즈니스 교육을 제공하는 전문 자격증 과정입니다.

본 자격증 프로그램을 통해, 보험 업계 용어, 기능별 영역 및 프로세스 등에 대한 내용을 체계적으로 공부하실 수 있으며, 상품별, 영역별 마케팅, 보험 관리, 및 재무보고 등에 관한 구체적인 지식을 습득 할 수 있습니다.

또한 FLMI의 필수 프로그램 중 절반을 이수할 경우, ALMI 자격증을 취득할 수 있으며, 고객 서비스 관련 자격증인 ACS도 해당 필수 과정을 통해 자격증을 취득할 수 있습니다.

### ALMI 프로그램

필수과정				
레벨 1		레벨 2		
원리	운영	보험 관리	투자	마케팅
LOMA 280 또는 LOMA 281*	LOMA 290 또는 LOMA 291*	LOMA 301 또는 LOMA 302*	LOMA 307 또는 LOMA 308*	LOMA 320 또는 LOMA 321*
LOMA 인증 부여				
ALMI 인증을 취득하기 위해서는 모든 필수 과정을 이수해야 합니다.				

### FLMI 프로그램

필수과정									
레벨 1		레벨 2			레벨 3				
원리	운영	보험 관리	투자	마케팅	법	관리 원칙과 실무	투자	회계	수익성과 지급능력
LOMA 280 또는 LOMA 281*	LOMA 290 또는 LOMA 291*	LOMA 301 또는 LOMA 302*	LOMA 307 또는 LOMA 308*	LOMA 320 또는 LOMA 321*	LOMA 311*	LOMA 330 또는 LOMA 335*	LOMA 356 또는 LOMA 357*	LOMA 361*	LOMA 371*
LOMA 인증 부여									
FLMI 인증을 취득하기 위해서는 모든 필수 과정을 이수해야 합니다.									

### ACS 프로그램

필수과정				
고객 서비스	원리	운영	보험 관리	마케팅
ACS 100 또는 ACS 101*	LOMA 280 또는 LOMA 281*	LOMA 290 또는 LOMA 291*	LOMA 301 또는 LOMA 302*	LOMA 320 또는 LOMA 321*
ACS 인증을 취득하기 위해서는 모든 필수 과정을 이수해야 합니다.				

\*영어로만 가능

**ACS 100****고객 서비스의 기초****Foundations of Customer Service**

ACS 100은 금융 서비스 분야의 고객 서비스에 대한 내용을 포괄적으로 다룹니다. 탁월한 고객 서비스를 위해 필요한 지식과 스킬에 관한 정보를 제공하고 있습니다.

**LOMA 280****보험의 원칙****Principles of Insurance: Life, Health, and Annuities**

생명, 건강 및 연금보험의 원리와 보험가입 절차, 보험 계약자의 계약상 권리에 대해 소개합니다. 본 과정에는 개인 및 단체 생명보험, 건강 보험, 연금상품의 특징에 대한 내용이 담겨있습니다.

**LOMA 290****보험 회사의 운영****Insurance Company Operations**

생명보험회사의 조직과 관리, 회사 운영에 대해 설명합니다. 상품 개발, 홍보, 운영에 관한 구체적인 내용에 대해서도 다루고 있습니다. 이를 통해, 회사내에서의 각각의 역할에 대한 이해를 도울 수 있습니다.

**LOMA 301****보험 행정****Insurance Administration**

언더라이팅, 금융업무와 같은 구체적인 회사운영에 초점을 두고 보험회사의 조직과 회사의 운영환경에 대해 설명합니다.

**LOMA 307****보험 전문가를 위한 비즈니스 및 금융 개념****Business and Financial Concepts for Insurance Professionals**

보험 비즈니스, 운영 및 이익 창출에 도움이 될 수 있는 정보, 금융 개념 및 용어를 다루며, 이와 관련된 유용한 내용을 소개합니다.

**LOMA 311 \*****Business Law for Financial Services Professionals**

전세계 금융서비스 기업들이 운영되고 있는 법적 환경의 기본적인 특징과 원칙에 대해 소개합니다.

**LOMA 320****생명 및 건강보험 마케팅****Life and Health Insurance Marketing**

생명 및 건강보험 산업의 필수요소인 마케팅 원칙과 마케팅 기능에 대해 살펴봅니다.

\* LOMA 320 한글 필기시험은 더 이상 운영하지 않습니다.

\* LOMA 320 한글 시험은 I\*STAR로만 가능합니다.

**LOMA 330****관리 원칙과 실무****Management Principles and Practices**

관리의 본질적인 기능과 이러한 기능이 수행되는 조직적, 환경적 배경을 역설하며 관리의 이론과 실무를 소개합니다.

\* LOMA 330 한글 필기시험은 더 이상 운영하지 않습니다.

\* LOMA 330 한글 시험은 I\*STAR로만 가능합니다.

**LOMA 356****투자 원칙과 기관 투자****Investment Principles and Institutional Investing**

개별 주식과 주식 포트폴리오 투자에 대한 투자환경과 전반적인 투자원칙에 대한 이해를 높입니다.

\* LOMA 356 한글 필기시험은 더 이상 운영하지 않습니다.

\* LOMA 356 한글 시험은 I\*STAR로만 가능합니다.

**LOMA 361 \*****Accounting and Financial Reporting in Life Insurance Companies**

회계기능이 발생하는 법인 및 규제환경 등 생명보험사의 재무와 관리 회계에 대해 폭넓게 소개합니다.

**LOMA 371 \*****Managing for Solvency and Profitability in Life Insurance Companies**

금융서비스 제공업체의 수익성과 지급여력에 영향을 미치는 상품 설계와 자산관리 이슈에 대해 설명합니다.

\*영어로만 가능

## LOMA 사이트 이용하기

### LOMA 어카운트 새로 만들기:

- [www.loma.org](http://www.loma.org)에서 LOMA LEARNING SYSTEM의 Login을 클릭하십시오.
- 로그인 화면에서, “Create Account”를 클릭한 후, Create New Account를 작성하면 됩니다. 이 때 입력한 로그인 아이디와 패스워드를 잘 기억하시기 바랍니다.

**\*주의사항:** 등록시, 본인 회사의 Organization Company ID를 입력하시기 바랍니다. 귀사의 Ed Rep에게 연락하셔서 확인하십시오. 회원사의 경우, 혜택을 받으실 수 있습니다.

### 예전에 LOMA에 등록했던 경우:

- 로그인 페이지에서 이전에 사용했던 LOMANET 아이디를 입력합니다. “Forgot your password?”를 클릭하면, 이전 LOMA 시스템에 등록되어 있는 이메일 주소로 임시 패스워드가 발송됩니다.
- “Forgot your password”로 해결되지 않는 경우, 저희 Contact Center로 연락하시기 바랍니다. 전화: +1 770 984 3761  
이메일: [education@loma.org](mailto:education@loma.org)

## LOMA 시험 및 코스 등록하기



### LOMA 사이트에 로그인 하기

로그인 아이디와 패스워드를 이용해 로그인합니다. 로그인에 문제가 있으신 경우, [education@loma.org](mailto:education@loma.org)로 문의하시기 바랍니다.



### 원하는 코스 선택하기

- 1) “Learning Catalog” 를 클릭합니다.
- 2) “Search For”에 원하는 코스 이름을 입력합니다.
- 3) “Search”를 클릭합니다. 원하는 언어를 선택하시면 검색이 더 용이합니다.
- 4) 원하는 코스를 선택합니다.
- 5) “Add to Cart”를 클릭합니다.
- 6) “Shopping Cart”를 클릭한 후 체크아웃을 하면 됩니다.
- 7) 여러 개의 코스를 카트에 담은 후 한꺼번에 체크아웃을 하셔도 됩니다.



### 결제하기

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## 온라인 인터랙티브 코스 (Online Interactive Course)

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## 문의사항

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여러 사정으로 인해 코스 만료일까지 시험을 치르지 못한 경우, 시험을 연기할 수 있습니다. 해당 시험 재등록시 시험 연장 할인 (Discounted Course Extension) 혜택을 받을 수 있습니다.

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- 다음 필기시험 등록기간에 동일 과목을 재등록 하게 되면, 시험 연장 할인 금액이 샤피카트에 자동으로 적용됩니다 (USD\$50). 이 기간동안에 재등록을 하지 않으면, 연장 할인 혜택을 받지 못합니다.

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- 코스가 만료된 후, 30일내에 재등록을 하게 되면, 시험 연장 할인을 적용받아 등록 비용이 USD\$50로 됩니다. 재등록시 샤피카트에 자동으로 적용됩니다.
- 코스 만료일로부터 30일이 지난 후에 재등록을 하는 경우, 시험 연장 할인을 적용받지 못하고, 해당 코스의 비용을 전액 결제해야 합니다.

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	I*STAR	필기	I*STAR	필기			
ACS 100	\$164	\$214	\$328	\$428	75	3	시험비용만 포함됨. 교재는 별도로 구매해야 함.
LOMA 280	\$96	\$146	\$192	\$292	60	2	시험비용만 포함됨. 교재는 별도로 구매해야 함.
LOMA 290	\$96	\$146	\$192	\$292	60	2	시험비용만 포함됨. 교재는 별도로 구매해야 함.
LOMA 301	\$96	\$146	\$192	\$292	75	3	시험비용만 포함됨. 교재는 별도로 구매해야 함.
LOMA 307	\$96	\$146	\$192	\$292	60	2	시험비용만 포함됨. 교재는 별도로 구매해야 함.
LOMA 320	\$96		\$192		75	3	시험비용만 포함됨. 교재는 별도로 구매해야 함.
LOMA 330	\$96		\$192		75	3	시험비용만 포함됨. 교재는 별도로 구매해야 함.
LOMA 356	\$96		\$192		75	3	시험비용만 포함됨. 교재는 별도로 구매해야 함.

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## 2018 필기 시험 일정

2018년 5월					
시간	5월 14일 (월)	5월 15일 (화)	5월 16일 (수)	5월 17일 (목)	5월 18일 (금)
오전 9시	LOMA 280	LOMA 290	LOMA 301	LOMA 311*	LOMA 320*
오후 1시	LOMA 335*	LOMA 357*	LOMA 307 ACS 100	LOMA 361*	LOMA 371*

2018년 11월					
시간	11월 5일 (월)	11월 6일 (화)	11월 7일 (수)	11월 8일 (목)	11월 9일 (금)
오전 9시	LOMA 280	LOMA 290	LOMA 301	LOMA 311*	LOMA 320*
오후 1시	LOMA 335*	LOMA 357*	LOMA 307 ACS 100	LOMA 361*	LOMA 371*

\*영어로만 가능

## Programas em Português

### Descrição do Programa PFLP

O Programa de Formação LOMA em Português (PFLP) é composto por nove cursos que abordam as atividades e as operações das seguradoras atuais. Todos os cursos permitem o estudo individualizado. Exames por computador são oferecidos durante todo o ano.

Os estudantes podem obter a certificação intermediária, completando duas etapas obrigatórias, e mais uma dentre as eletivas. Para obter o Diploma PFLP, será necessário completar todas as nove etapas do PFLP.

#### PFLP Level 1

Etapas Obrigatórias	
Princípios	Operações
PFLP 280	PFLP 290

#### ALMI (Associate, Life Management Institute)

Etapas Obrigatórias				
Princípios	Operações	Administração	Conceitos Financeiros	Marketing
PFLP 280	PFLP 290	PFLP 301	PFLP 307	PFLP 320

#### ACS (Associate, Customer Service)

Etapas Obrigatórias			Eletivas — Selecione dois		
Serviços ao Cliente	Princípios	Operações	Administração	Conceitos Financeiros	Marketing
PFLP 100	PFLP 280	PFLP 290	PFLP 301	PFLP 307	PFLP 320

#### PFLP

Etapas Obrigatórias								
Princípios	Operações	Serviços ao Cliente	Administração	Marketing	Investimentos e Investimento Institucional	Solvência e a Lucratividade	Subscrição	Resseguro
PFLP 280	PFLP 290	PFLP 100	PFLP 301	PFLP 320	PFLP 356	PFLP 371	PFLP 386	PFLP 440

Para obter o Diploma PFLP, será necessário completar todas as **NOVE** etapas do PFLP.

## Cursos do Programa PFLP

### PFLP 280

#### Princípios dos Seguros de Vida, Saúde, e de Rendas Vitalícias

O PFLP 280 apresenta os princípios do seguro, o processo de se tornar um segurado, e os direitos contratuais de um segurado. O curso inclui informações sobre as características do seguro de vida individual e em grupo, seguro saúde e anuidades.

Todos os materiais de estudo para o curso PFLP 280 estão agora disponíveis em um formato PDF Protegido para ser baixado. Os estudantes matriculados para esse curso podem imprimir o material de estudo.

#### Princípios dos Seguros de Vida, Saúde, e Rendas Vitalícias (LOMA, 2010)

ISBN 978-1-57974-345-1

#### Caderno de Exercícios para o curso PFLP 280 (LOMA, 2010)

ISBN 978-1-57974-346-8

### PFLP 290

#### As Operações de uma Seguradora

Este curso descreve como as seguradoras de vida operam no ambiente globalizado dos dias de hoje: como estão organizadas, como são gerenciadas, e os papéis das unidades funcionais e de suporte no desenvolvimento, distribuição, emissão e administração dos produtos de seguros de vida e anuidades. Os estudantes que fizerem este curso passarão a compreender melhor como um trabalho individual se contextualiza no escopo total da companhia, assim como a importância da contribuição de cada funcionário para o sucesso empresarial como um todo.

#### As Operações de uma Seguradora (LOMA, 2013)

ISBN 978-1-57974-406-9

#### Caderno de Exercícios para o curso PFLP 290 (LOMA, 2013)

ISBN 978-1-57974-407-6

### PFLP 100

#### Fundamentos do Serviço de Atendimento ao Cliente

O PFLP 100 provê uma introdução abrangente do atendimento ao cliente no ambiente de serviços financeiros. O curso explora o conhecimento e as habilidades das quais um empregado precisa para compreender e prestar um excepcional atendimento ao cliente.

#### Fundamentos do Serviço de Atendimento ao Cliente (LOMA, 2007)

ISBN 1-57974-245-9

#### Caderno de Exercícios para o Curso PFLP 100 (LOMA, 2007)

ISBN 1-57974-246-7

### PFLP 301

#### Administração de Seguros

O PFLP 301 provê uma discussão detalhada sobre as atividades da administração de seguros para coberturas de vida e saúde individuais e em grupo, focando a subscrição, o resseguro, sinistros e o atendimento ao cliente.

#### Administração de Seguros, 2ª edição (LOMA, 2005)

ISBN 1-57974-201-7

#### Caderno de Exercícios para o curso PFLP 301 (LOMA, 2005)

ISBN 1-57974-202-5

### PFLP 307

#### Conceitos de Negócios e Finanças para Profissionais de Seguros

PFLP 307 apresenta aos profissionais da indústria de seguros os conceitos básicos e a terminologia de finanças, relacionando esses conceitos aos negócios, às operações e à lucratividade de uma companhia de seguros.

#### Conceitos de Negócios e Finanças para Profissionais de Seguros (LOMA, 2013)

ISBN 978 -1-57974-424-3

#### Exercícios para o curso PFLP 307 (LOMA, 2013)

ISBN 978-1-57974-425-0

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**PFLP 320  
Marketing**

O PFLP 320 aborda os princípios e as funções do marketing como aspecto integral da indústria dos seguros de vida e saúde.

**Marketing do Seguro de Vida e Saúde, Terceira Edição**  
(LOMA, 2007)

**Caderno de Exercícios para o PFLP 320** (LOMA, 2007)

**PFLP 356  
Princípios de Investimentos  
e Investimento Institucional**

O PFLP 356 provê a compreensão do ambiente de investimentos e os princípios gerais de investimento em títulos individuais e carteiras de títulos. Neste curso, você aprenderá sobre os relatórios de desempenho de investimentos, monitoramento de desempenho de investimentos, desempenho de investimentos, e mais.

**Princípios de Investimentos** (LOMA, 2005)

ISBN 85-88639-15-7

**Investimento Institucional CD-ROM** (LOMA, 2005)

ISBN 85-88639-20-3

**Caderno de Exercícios para o curso PFLP 356**  
(LOMA, 2005)

ISBN 1-57974-239-4

**PFLP 371  
Gerenciamento de Riscos  
e Desenho de Produtos para  
Companhias de Seguros**

O PFLP 371 explica questões de gerenciamento que envolvem o gerenciamento de riscos empresariais, capital, desenvolvimento de produto e desenho de produto para seguro de vida e anuidades.

**Gerenciamento de Riscos e Desenho de Produtos para  
Companhias de Seguros** (LOMA, 2010)

ISBN 978-1-57974-376-5

**Caderno de Exercícios Preparatórios para o Curso  
PFLP 371 — Gerenciamento de Riscos e Desenho de  
Produtos para Companhias de Seguros** (LOMA, 2010)

ISBN 978-1-57974-377-2

**PFLP 386  
Subscrição Seguros de Vida e Saúde**

O PFLP 386 apresenta os princípios de avaliação de riscos aplicados à subscrição no seguro de vida e saúde individual e em grupo, incluindo apólices especializadas e coberturas suplementares.

**Subscrição de Seguros de Vida e Saúde** (LOMA, 2008)

**Caderno de Exercícios para o curso PFLP 386**  
(LOMA, 2008)

**PFLP 440****Administração de Resseguro**

O PFLP 440 mostra como o resseguro reforça a indústria do seguro e aumenta a capacidade das seguradoras de pagar sinistros antecipados. Este curso também discute princípios de resseguro, regulação de resseguro, cláusulas típicas em um acordo de resseguro, a administração do negócio do resseguro, e a importância do controle de qualidade no resseguro.

**Fundamentos de Resseguro** (LOMA, 2008)

**Caderno de Exercícios para o curso PFLP 440**  
(LOMA, 2008)

**Cursos Online****O Processo de Venda de Seguros**

**Descrição:** Esse curso descreve a importância da venda pessoal para companhias de seguro e as etapas inclusas no processo de venda de seguros. O curso também descreve os comportamentos que os clientes exibem ao tomarem decisões de compra e as etapas do processo de decisão pela compra. Outros tópicos importantes relatados nesse curso incluem métodos de identificar, contatar e classificar clientes em potencial com ênfase nas maneiras pelas quais corretores de seguros colhem informações, analisam as necessidades de clientes e preparam propostas que atendam tais necessidades.

Fornecedor: LOMA

Número de Aulas: 1

Tempo estimado de conclusão do curso: 1 hora

Preço para Associado LOMA: US\$42.00

Preço para Não-associado LOMA: US\$84.00

**Excepcional atendimento ao cliente**

**Descrição:** O atendimento excepcional ao cliente se concentra no atendimento ao cliente no setor de serviços financeiros: o que é, como ele é fornecido e porque é importante. O curso analisa:

- A natureza do atendimento excepcional ao cliente
- Os tipos de clientes de serviços financeiros
- A oferta do atendimento ao cliente nos níveis individuais e organizacionais
- Os desafios do atendimento ao cliente
- Retenção e fidelização dos clientes

Não importa se você é um novo representante do atendimento ao cliente lidando com clientes pela primeira vez ou um profissional experiente à procura de aperfeiçoamento, este curso pode ajudá-lo a reforçar a sua compreensão do atendimento ao cliente.

Fornecedor: LOMA

Número de Aulas: 1

Tempo estimado de conclusão do curso: 1 hora

Preço para Associado LOMA: US\$42.00

Preço para Não-associado LOMA: US\$84.00



## Inmersión en Seguros

### Entrenamiento Presencial Intensivo

El Programa de Inmersión en Seguros ha sido desarrollado como una experiencia de formación presencial, orientado para optimizar la curva de aprendizaje de nuevos ejecutivos en la industria y personal en divisiones de apoyo, permitiéndoles alcanzar su mejor nivel operativo en el menor tiempo posible.

Fue diseñado en LOMA por profesionales expertos de la industria, brinda los conocimientos esenciales y herramientas para el éxito, como: estrategia de negocios, estructura de la industria, operaciones, productos, interacción entre áreas y terminología.

En un entorno colaborativo, se incluyen casos de estudio y discusiones con instructores expertos que resolverán dudas y compartirán sus experiencias, integrando todos los conceptos de la industria.

Los temas que cubre son:

1. Visión General de la Industria
2. Productos de Seguros de Vida y Anualidades, su distribución, rentabilidad por línea de negocios, y tendencias de productos.
3. Suscripción, servicio al cliente, eficiencia operacional, reclamaciones.
4. Conceptos básicos de los estados financieros, estándares de contabilidad financiera y gestión del riesgo.

\*Nota: Este programa toma como referencia la industria aseguradora en Estados Unidos y no cubre productos de salud.

## Programas Profesionales de Titulaciones Académicas

### ¡Bienvenido!

Nos complace saber de su interés en nuestros cursos y programas que le permiten obtener una titulación técnica en seguros. Nuestras Titulaciones Académicas son de reconocimiento profesional y prestigio a nivel internacional.

- PFSL™ Programa de Formación en Seguros de LOMA™
- ACS® Grado Asociado en Servicio al Cliente™
- ALMI® Grado de Asociado en Gestión de Compañías de Seguros™
- LCIC™ Asesor de Seguros Certificado de LOMA™

Cada curso se diseña bajo la orientación de un grupo de profesionales expertos en la industria de servicios financieros y seguros. El nivel de especialización y conocimiento de este grupo, garantizan que el material de estudio esté actualizado y sea relevante para el trabajo y la carrera de los estudiantes.

### LOMA, el líder mundial en capacitación y desarrollo profesional

Durante casi 100 años, LOMA ha servido a la industria como la fuente confiable de conocimiento, convirtiéndose en socio estratégico de sus compañías miembro alrededor del mundo y apoyándolos con la gestión de sus negocios y procesos operativos.

Las investigaciones han demostrado que los cursos y las Titulaciones Académicas de LOMA mejoran el desarrollo de sus empleados y ayudan a optimizar las operaciones de la compañía, aumentando sus ingresos.

*Personas que han alcanzado Titulaciones Académicas de LOMA en todo el mundo dan testimonio y aseguran haber recuperado la inversión que hicieron en su formación:*

- 90% afirma que obtener las Titulaciones Académicas de LOMA los ha ayudado en sus carreras
- 87% cree que los programas de LOMA han aumentado su nivel competitivo en el negocio de seguros

*Si está interesado en obtener acceso a un mundo de conocimiento en la industria y adquirir buenos fundamentos para su crecimiento profesional, contáctese con LOMA.*

## ¿Qué dicen nuestros estudiantes de los cursos de LOMA y sus titulaciones académicas?

*“En mis 30 años de trabajar en el mundo de los seguros, he podido constatar que la responsabilidad que adquirimos al asesorar a nuestros clientes, en áreas tan delicadas, como el seguro de vida y el seguro médico, requieren de nosotros un alto nivel de ética y preparación. Participar en la formación de los programas de LOMA, me ha permitido reforzar mis conocimientos y actualizarlos. Son sin duda, los programas de formación de seguros más completos a nuestro alcance”.*

*Johnny Sordo, PFSL, ACS, LCIC  
Vicepresidente Ejecutivo*

*“En gran medida la titulación académica PFSL de LOMA ha contribuido a mis logros en el trabajo ya que el contenido y los conocimientos que obtuve con mi titulación se ajustaron perfectamente a mis necesidades profesionales, además que esto se dio en el momento oportuno para obtener un puesto de mayor responsabilidad. Concluir la titulación académica PFSL significó un gran logro profesional y personal dado que no soy especialista en el campo. Mis estudios abrieron oportunidades profesionales en función de las competencias adquiridas.”*

*Rubi M. Viruegas Benitez, PFSL, ACS  
Asistente General*

*“Las titulaciones académicas de LOMA me han ayudado tanto profesional como personalmente ya que con los conocimientos adquiridos he logrado mejorar la calidad de mi trabajo; aumentar mi seguridad al tomar decisiones, aumentar el respeto de mis compañeros hacia mi trabajo; satisfacción de sentir que soy útil y mejores evaluaciones de desempeño laboral. Estos son algunos de los beneficios y lo mejor, es que los llevo conmigo, no se quedan en mi escritorio, ya que muchos de estos conocimientos pueden ser aplicados en otros aspectos de la vida. Me siento orgullosa de las titulaciones académicas alcanzadas.”*

*Zoraida Cotto, ACS, PFSL, AALU  
Examinadora de Reclamaciones II*

*“Obtener las titulaciones académicas ACS y PFSL de LOMA ha sido una experiencia verdaderamente enriquecedora para mí, tanto por los conocimientos adquiridos, como por el nivel académico alcanzado, lo que me ha abierto las puertas a un mundo de valiosas oportunidades para aspirar a nuevas y mejores posiciones en el campo laboral”.*

*Constantino Kafaltis C., ACS, PFSL  
Vice-Presidente Adjunto – Mercadeo Vida*

*“La titulación académica ALMI me ayudó a construir un fundamento sólido en diferentes aspectos de la industria de seguros”*

*Janice Alfonso, FLMI  
Marketing*

## Para Mayor Información

Contacte al Representante Educativo de LOMA de su compañía o revise la información que encuentra a continuación. También nos puede escribir al e-mail: [intl@loma.org](mailto:intl@loma.org)

## Titulaciones Académicas en Español

### PFSL (Programa de Formación en Seguros de LOMA)

Diseñado especialmente para estudiantes de habla hispana, el título PFSL consta de seis cursos de LOMA que proporcionan el conocimiento, las aptitudes profesionales y la confianza en sí mismo, necesarios para triunfar en el entorno competitivo de hoy. Los cursos proporcionan información sobre los principios básicos del seguro, las operaciones de las compañías aseguradoras, la administración de seguros, el mercadeo de los seguros de vida y de salud, los fundamentos del servicio al cliente y finanzas o principios de la inversión y la inversión institucional. A través del plan de estudio del PFSL, los estudiantes podrán realizar lo siguiente:

- Descubrir capacidades que se aplican directamente a su trabajo en la industria de servicios financieros y de seguros
- Centrarse en conceptos importantes usando las ayudas de auto-estudio incluidas en el material
- Estudiar a su propio ritmo
- Tomar los exámenes del curso en su oficina, sin necesidad de desplazarse
- Obtener reconocimiento por su progreso de estudio

#### Plan de Estudio para la Titulación Académica PFSL

Cursos Obligatorios					
Principios del Seguro de Vida	Operaciones	Administración de Seguros	Finanzas/Inversión	Mercadeo	Servicio al Cliente
PFSL 280	PFSL 290	PFSL 301	PFSL 307 o PFSL 356	PFSL 320	PFSL 100
<b>Nivel 1:</b> Los estudiantes recibirán un certificado personalizado al término de los cursos PFSL 280 y 290					

### ACS (Grado Asociado, Servicio al Cliente)

El programa (ACS) Grado Asociado, Servicio al Cliente ofrece una excelente forma de aprender acerca de los fundamentos del servicio al cliente para los profesionales de seguros.

Los empleados pueden obtener beneficios del Programa ACS en todos los niveles, y está diseñado para cualquier persona que interactúa con clientes internos o externos. El programa

ACS tiene como fin que los estudiantes puedan realizar lo siguiente:

- Aumentar su conocimiento sobre servicios financieros
- Comprender los tipos de clientes, sus comportamientos y sus expectativas
- Organizar un equipo efectivo de servicio al cliente

#### Plan de Estudios para la Titulación Académica ACS

Cursos Obligatorios			Cursos Electivos — Elegir 2		
Servicio al Cliente	Principios del Seguro de Vida	Operaciones	Administración	Finanzas	Mercadeo
PFSL 100	PFSL 280	PFSL 290	PFSL 301	PFSL 307	PFSL 320



## ALMI (Grado de Asociado en Gestión de Compañías de Seguros)

¡Solamente necesita 5 cursos para conseguir el título ALMI de LOMA, solo eso! El programa ALMI se centra en las operaciones de servicios financieros y de seguros. Además brinda una representación profunda de los conceptos financieros que son relevantes para quien trabaja en la industria: ¡usted!

Mientras cursan el ALMI, los estudiantes consolidarán su visión financiera, aprenderán sobre los aspectos operacionales y sobre las funciones de ventas o mercadeo que hacen único al sector financiero y de seguros.

Una vez completados los primeros dos cursos del título ALMI, los estudiantes obtienen un certificado de Nivel 1 y al completar los 3 cursos restantes, los estudiantes reciben el diploma del título ALMI.

### Plan de Estudios para la Titulación Académica ALMI

Cursos Obligatorios				
Principios del Seguro de Vida	Operaciones	Administración de Seguros	Finanzas	Mercadeo
PFSL 280	PFSL 290	PFSL 301	PFSL 307	PFSL 320
<b>Nivel 1:</b> Los estudiantes recibirán un certificado personalizado al término de los cursos PFSL 280 y 290				

## LCIC (Asesor de Seguros Certificado de LOMA)

Especialmente diseñado para agentes y corredores (brokers), el programa Asesor de Seguros Certificado de LOMA (LCIC), ha sido creado con el fin de satisfacer las necesidades de capacitación y conocimiento que hoy en día requieren los agentes y corredores que prestan servicio a una gran

cantidad de clientes. El LCIC es un programa que se centra en el conocimiento de productos, ventas y temas que los agentes y corredores necesitan para sobresalir en un ambiente competitivo y exigente.

### Plan de Estudios para la Titulación Académica LCIC

Cursos Obligatorios			
Principios del Seguro de Vida	Mercadeo	Servicio al Cliente	10 cursos cortos en línea (18 horas)
PFSL 280	PFSL 320	PFSL 100	

## ¿En qué Consiste la Titulación Académica LCIC?

El programa LCIC, está compuesto de 3 cursos de Autoestudio y 10 cursos cortos en línea (18 horas). Al completar los trece cursos, el estudiante recibirá el diploma que lo acredita con la titulación académica de Asesor de Seguros Certificado de LOMA (LCIC).

### Textos de Autoestudio:

- PFSL 280: Principios del Seguro de Vida, Salud y Rentas Vitalicias
- PFSL 320: Mercadeo en la Industria del Seguro de Vida y Salud
- PFSL 100: Fundamentos de Servicio al Cliente

Tiene la posibilidad de adquirir un conocimiento técnico con los 3 cursos de Autoestudio mencionados anteriormente y continuar el proceso de educación continua hacia la obtención del Programa de Formación en Seguros LOMA (PFSL).

### Los 10 Cursos Cortos En Línea:

#### Perspectiva general de los productos de seguros de vida

Este curso define los términos del seguro de vida y describe las características del seguro temporal, de valor en efectivo y dotal.

Tiempo estimado de estudio: 2 horas

#### Perspectiva general de los productos de anualidades

Este curso ofrece una visión general básica de las características de los productos de rentas vitalicias variable y fija.

Tiempo estimado de estudio: 1 hora

#### Selección de riesgos del seguro de vida individual

Este curso analiza los principios y las prácticas fundamentales de la selección de riesgo del seguro de vida individual.

Tiempo estimado de estudio: 2 horas

#### Perspectiva general del reaseguro

Este curso ofrece una introducción sobre los fundamentos del reaseguro incluyendo el proceso de transferir el riesgo entre aseguradores directos o cedentes, reaseguradores y retrocesionarios.

Tiempo estimado de estudio: 1 hora

#### Distribución de seguros a través de los agentes

La mayoría de los seguros de vida son distribuidos a través de los agentes de seguro, conocidos también como productores. En este curso aprenderá sobre varios aspectos de la distribución del seguro basada en los agentes.

Tiempo estimado de estudio: 1 hora

#### El proceso de la venta de seguros

Este curso describe la importancia de la venta personal para las compañías de seguros y los pasos incluidos en el proceso de venta del seguro.

Tiempo estimado de estudio: 1 hora

#### Capacitación en ventas para los productores de seguros

Este curso está diseñado para ayudar a los agentes de ventas con o sin experiencia y al personal de apoyo a entender la importancia del proceso de ventas para generar negocios y crear relaciones con los clientes a largo plazo.

Tiempo estimado de estudio: 5 horas

#### Conducta ética en la industria de seguros

Este curso se concentra en la responsabilidad de las compañías de seguros y sus productores o agentes, de actuar éticamente y tomar decisiones apropiadas al llevar a cabo los negocios de seguros.

Tiempo estimado de estudio: 1 hora

#### Introducción a las ventas básicas de acuerdo a las necesidades

Este curso explica la importancia de las ventas de acuerdo a las necesidades, cual es el proceso que un productor sigue para diseñar una cartera de seguros que satisfaga las necesidades de los clientes, de sus familiares y dependientes.

Tiempo estimado de estudio: 3 horas

#### Reemplazo de las pólizas de vida y anualidades

Este curso proporciona una revisión rigurosa sobre los reemplazos de las pólizas de seguro de vida y anualidades.

Tiempo estimado de estudio: 1 hora

#### Precios

Cada curso corto en línea para el programa de LCIC tiene un costo de US \$45 para miembros de LOMA y US\$90 para no-miembros.

**Para conocer más acerca de los precios de los cursos de Autoestudio, consulte la sección “Tarifas de Cursos y Exámenes”.**

## Descripción de Cursos y Material

### Cursos de Autoestudio

- Todos los materiales de estudio con la excepción de PFSL 356, están disponibles al momento que realice su matrícula y a través de un portal que incluye el libro en formato PDF y una guía de preparación para el examen.
- El texto PFSL 356 es un libro comercial y no es de propiedad de LOMA, (Texto Base de Estudio) por lo tanto, no estará disponible en formato PDF y deberá ser adquirido por separado a través de nuestro distribuidor en Estados Unidos PBD Worldwide.
- Los 8 cursos listados a continuación, PFSL 100, 280, 290, 301, 307, 320, 356 y UND 386, a continuación son de Autoestudio y contienen un examen de práctica en el portal del curso. El examen final es supervisado y se presenta a través de la aplicación I\*STAR de LOMA.

**Nota:** Para mayor información consulte con la sección Exámenes en I\*STAR

### PFSL 100 Fundamentos del Servicio al Cliente

Este curso está diseñado para ofrecerle conocimientos básicos acerca de conceptos y estrategias de servicio al cliente, la creación y el mantenimiento de una cultura de servicio, el desarrollo de una estrategia de servicio de calidad, conocimiento del cliente y entendimiento real de los estudios de servicio, establecimiento y medición de los sistemas de servicio al cliente y desarrollo de empleados dedicados a ofrecer servicio de calidad.

**Fundamentos del Servicio al Cliente** (LOMA, 2004), ISBN 1-57974-265-3

**Guía de Preparación — Fundamentos del Servicio al Cliente** (LOMA, 2004), ISBN 1-57974-266-1

### PFSL 280 Principios del Seguro de Vida, Salud y Rentas Vitalicias

Este curso introduce los principios fundamentales de operaciones de las compañías de seguros, los derechos del suscriptor y los procesos para comprar un seguro. También incluye información sobre las características principales del seguro de vida y salud en pólizas individuales o de grupo y la de otros productos como rentas y pensiones.

**Principios del Seguro de Vida, Salud y Rentas Vitalicias, Tercera Edición** (LOMA, 2009), ISBN 978-1-57974-336-9

**Guía de Preparación — Principios del Seguro de Vida, Salud y Rentas Vitalicias, Tercera Edición** (LOMA, 2009) ISBN 978-1-57974-337-6

### PFSL 290 Operaciones de las Compañías de Seguros

El curso PFSL 290 describe cómo operan las compañías de seguros en el ambiente global de hoy, cómo están organizadas, cómo se manejan y el rol de las unidades funcionales y de apoyo en el desarrollo, distribución, emisión y administración del seguro de vida y las rentas vitalicias. Los aprendices que toman este curso entenderán mejor cómo su trabajo se acomoda dentro del esquema total de la empresa, así como también la importancia de la contribución de cada uno de ellos al éxito total de la organización.

**Operaciones de las Compañías de Seguros, Segunda edición** (LOMA, 2013), ISBN 978-1-57974-408-3

**Guía de Preparación — Operaciones de las Compañías de Seguros** (LOMA, 2013), ISBN 978-1-57974-409-0

### PFSL 301 Administración de Seguros

Este curso analiza y describe las actividades administrativas involucradas en rentas vitalicias y seguros de vida y salud en pólizas individuales y colectivas, haciendo énfasis en la selección de riesgos, el reaseguro, reclamos y el servicio al cliente.

**Administración de Seguros, Segunda Edición** (LOMA, 2002), ISBN 1-57974-143-X

**Guía de Preparación — Administración de Seguros** (LOMA, 2002), ISBN 1-57974-144-4

### **PFSL 307** **Conceptos de Negocios y Finanzas para Profesionales de Seguros**

El PFSL 307 presenta a los empleados de la industria una introducción básica de conceptos y terminología financiera y relaciona estos conceptos al negocio y a la rentabilidad de las operaciones de las compañías de seguros.

**Conceptos de Negocios y Finanzas para Profesionales de Seguros** (LOMA, 2011), ISBN 978-1-57974-364-2

**Guía de Preparación- Conceptos de Negocios y Finanzas para Profesionales de Seguros** (LOMA, 2011), ISBN 978-1-57974-365-9

### **PFSL 320** **Mercadeo en la Industria del Seguro de Vida y Salud**

Este curso analiza los principios de mercadotecnia y las funciones de mercadeo como parte integral de la industria del seguro de vida y salud.

**Mercadeo en la Industria del Seguro de Vida y Salud, Tercera Edición** (LOMA, 2003), ISBN 1-57974-183-5

**Guía de Preparación — Mercadeo en la Industria del Seguro de Vida y Salud** (LOMA, 2003), ISBN 1-57974-184-3

### **PFSL 356** **Fundamentos de Inversión y la Inversión Institucional**

El PFSL 356 proporciona conocimientos sobre los principios generales de las inversiones en valores individuales y de carteras. El curso ofrece el establecimiento y la puesta en marcha de objetivos de inversión del equilibrio entre riesgo y retorno.

**Importante\***: PFSL 356 incluye el valor del examen y el acceso a la guía de preparación en formato PDF. El **libro físico** de estudio se deberá **adquirir a un costo adicional** a través del distribuidor PBD a continuación:

### **PFSL 356** **LIBRO Físico y Un CD**

**Fundamentos de Inversión (LOMA, 2005)**,

ISBN 1-57974-242-4

**Introducción a la Inversión Institucional (LOMA, 2005)**,

ISBN 1-57974-244-0

**Guía de Preparación para el PFSL 356 (LOMA, 2005)**,

ISBN 1-57974-243-2/PFSL\*

#### **PBD Worldwide**

Web site: [www.lomabookstore.com](http://www.lomabookstore.com)

E-mail: [lomaintl@pbd.com](mailto:lomaintl@pbd.com)

Tel: 800-887-3723 / 770-280-4178

- Código para el pedido del libro físico a PBD: PFSL 356-S10-05
- En caso de pérdida o daño del CD, se puede reemplazar con PBD.

### **UND 386** **Selección de Riesgos en el Seguro de Vida y Salud**

El curso UND 386 proporciona una visión general de los factores médicos y no médicos, financieros y personales que se consideran durante la selección de riesgos, según se practica en las compañías de seguro de vida y salud.

**Selección de riesgos en el seguro de vida y salud** (LOMA, 2006)

ISBN 1-57974-295-5

**Guía de preparación para UND 386** (LOMA, 2006)

ISBN 1-57974-296-3

**Nota:** Usted podrá entender con más facilidad el material presentado en el curso UND 386 si tiene un conocimiento básico de los principios del seguro y los productos de las operaciones de las compañías de seguro y la administración del seguro. LOMA recomienda que complete los cursos PFSL 280, PFSL 290 y PFSL 301 antes de tomar este curso.

#### **Cursos Adicionales en Línea**

¿Se ha preguntado cómo capacitar a su personal en temas complejos como liderazgo, toma de decisiones, manejo de proyectos, riesgo, calidad, manejo y entendimiento de cualidades que se necesitan para el servicio y para la venta? No se pregunte más. LOMA pone a disposición de sus miembros un catálogo completo de cursos en español destinados a formar y capacitar a los participantes en estos temas. **Para más información, visite** <http://learning.loma.org/Catalog/TrainingCatalog.aspx>

## Ingreso, Inscripción de Cursos, y Cómo Obtener el Material de Estudio

El [Catálogo de Cursos](#) digital incluye todas las descripciones del curso en donde le permite filtrar por tema, idioma, y programa para facilitar la selección de su aprendizaje para poder alcanzar sus objetivos.

Aunque tenemos información disponible en nuestro sitio web [www.loma.org](http://www.loma.org), asegúrese de acceder a nuestro catálogo digital <http://learning.loma.org/public/searchresults.aspx> para tener acceso a más información.

### Usuario Registrado

Como usuario registrado en la plataforma [learning.loma.org](http://learning.loma.org), usted tendrá acceso a:

- Precios de los cursos de su compañía (miembro o no miembro)
- Acceder a los materiales de estudio
- Realizar inscripciones de los cursos
- Informarse sobre la fecha de vencimiento para concluir el curso y el examen
- Ver su historial de aprendizaje y calificación
- Acceso al catálogo digital de todos los cursos LOMA
- Informarse acerca de su progreso hacia la obtención de su titulación académica
- Y mucho más...

### Ingreso a la Plataforma de LOMA

Para mantener la confidencialidad, un nombre de usuario y una contraseña son necesarios para acceder a su cuenta de aprendizaje.

#### ***Si Usted es un Usuario Nuevo:***

El registro de su usuario es fácil y gratis!

- Visite [learning.loma.org](http://learning.loma.org)
- En la pantalla de inicio haga clic en “Crear Nuevo Usuario” o en “CREATE ACCOUNT”.
- Complete el formulario de inscripción en línea para crear su cuenta. Asegúrese de proveer un e-mail válido tanto de trabajo como personal. Todas las confirmaciones de inscripciones, informes importantes y recordatorios de estudio se enviarán a su e-mail.

**Nota:** En LOMA asignamos a cada compañía un número, asegúrese de incluirlo en el formulario de registro en línea para recibir los beneficios de tarifas de los productos y servicios para nuestros miembros. Consulte con el Representante Educativo de su compañía para solicitar esta información y confirmar el status de la membresía con LOMA.



## Pasos para realizar una matrícula:



### PASO UNO: Ingrese a la Plataforma de LOMA

Ir al sitio web [learning.loma.org](http://learning.loma.org) e ingrese su usuario y clave. Si no tiene usuario y clave, haga click en el hipervínculo: “CREATE ACCOUNT” (Crear Cuenta). Pregúntele a su Representante Educativo el número de su organización para que lo incluya en el formulario y termine de llenar todos los campos marcados con asterisco rojo\*. Al final de la página haga click en crear.



### PASO DOS: Seleccione los Cursos

Una vez en la plataforma, podrá navegar la opción [Catálogo de Cursos](#) (Learning Catalog). Ahí, encontrará todos los cursos que ofrece LOMA. Utilice los filtros de búsqueda para refinar su búsqueda por idioma, tema y tipo de curso. La descripción de cada curso incluye detalles sobre el formato, objetivos de aprendizaje, costo y demos (cuando estén disponibles).

Después de revisar la descripción del curso, haga clic en “Agregar al carrito” para inscribirse. Puede regresar al catálogo para seguir buscando cursos o para añadir productos adicionales a su carrito de compras.

Una vez que haya seleccionado todos los productos que desea comprar, haga clic en el ícono del carrito de compra situado en la parte superior de la pantalla para finalizar la compra.

**Nota para Representantes Educativos:** También pueden inscribir a los estudiantes en los cursos de Loma. Para inscribir a más de 20 estudiantes a la vez, comuníquese con el Contact Center de LOMA para aprender acerca de una herramienta de inscripción que le ahorrará tiempo.



### PASO TRES: Finalizar su Compra

Revise su carrito de compras para confirmar que todas las selecciones estén correctas. Si tiene un código promocional, ingréselo en el campo “Código de descuento”. Haga clic en “Aplicar código(s) de descuento” para ver el monto reducido en su carrito de compras, luego haga clic en “Comprar Ahora”.

Deberá aceptar los “Términos y Condiciones” de LOMA y a continuación, hacer clic en “Comprar Ahora” para finalizar su compra. Recibirá un e-mail con la confirmación de la inscripción.

## Responsabilidades de los Estudiantes

Si usted elige participar como estudiante en los programas de LOMA, es responsable de:

- Conocer el curso y los requisitos del programa, mantenerse al tanto de los cambios en el Catálogo de Cursos y Entrenamiento LOMA y en el sistema de aprendizaje de LOMA.
- Inscribirse en el (los) curso(s) correspondiente(s) que desea realizar para alcanzar sus objetivos de capacitación profesional.
- Estudiar las ediciones correctas y correspondientes al material de estudio asignado para cada curso al que esté inscrito.
- Cumplir con las reglas y normas de LOMA para garantizar la integridad de los cursos, programas y titulaciones académicas.
- Tomar los exámenes supervisados y adherirse a las directrices del examen computarizado I\*STAR establecidas por su compañía.
- Cumplir con los plazos de fechas límite, Términos de Uso, Acuerdos de Licencia, declaración de Honestidad, procedimientos y reglamentos.
- Denunciar inmediatamente ante LOMA cualquier acto deshonesto en los exámenes o violaciones de Términos de Uso, acuerdos de licencia, la declaración de Honestidad, procedimientos o reglamentos.

## Cómo Obtener el Material de Estudio y la Extensión del Examen:

### Acceder a los Materiales de Estudio en Línea

Una vez que su compra esté finalizada, usted podrá obtener los materiales del texto en formato PDF para los cursos de Autoestudio. Para acceder al curso:

- Ingrese al sitio: <https://learning.loma.org/Default.aspx>
- Asegúrese que está en la página de “**Inicio de Capacitación**” y haga clic en el título del curso
- Bajo la casilla de Título **haga clic en el link** del Portal del Curso y seleccione “**Abrir Elemento**”
- **Acepte los términos** para acceder a su material de estudio y para obtener el examen de práctica de I\*STAR

### Cursos Cortos en Línea

El plazo para acceder a los materiales de estudio y tomar los cursos cortos en línea es de **seis meses** a partir de la fecha de inscripción. Para recibir crédito o culminación del curso, usted debe completar satisfactoriamente todos los exámenes integrados en el curso en línea durante el plazo en que esté tomando el curso.

### Cursos de Acreditaciones (Auto-Estudio)

La inscripción en un curso de acreditación académica incluye acceso a todo el material de estudio necesario en formato PDF. El material se accede a través de la página de LOMA durante un plazo de seis meses a partir de la fecha de inscripción.

Se permite imprimir **una copia** del texto en PDF y **una copia** de la Guía de Preparación del examen para su uso personal. La única excepción es el curso PFSL 356, que requiere la adquisición del libro físico a un costo adicional. Si decide imprimir su material de estudio o descargarlo en una tableta, laptop u otro dispositivo que le permite abrir el PDF asegúrese que sus materiales sean actuales. Cada curso se enumera en esta sección del catálogo en español, así como en el Catálogo digital.

Usted tiene acceso al examen de práctica en el portal del curso. El examen final se presenta a través de internet en la plataforma I\*STAR y debe de ser supervisado.

No es recomendable estudiar con los exámenes anteriores como guía de estudio.

### Extensión del Acceso al Curso/Examen de Acreditación Académica

Si no ha culminado con los requisitos del curso en línea del programa de su titulación académica o no presentó el examen supervisado de I\*STAR al final del plazo de seis meses o la fecha límite listada en el expediente académico del estudiante, puede inscribirse nuevamente para extender un plazo adicional de seis meses.

El costo de inscribirse nuevamente varía, dependiendo de la fecha límite y cuando se inscriba nuevamente.

A continuación, **las siguientes observaciones:**

- Se puede extender un plazo adicional de 6 meses antes de la fecha límite listada en el expediente académico. Simplemente se hace la inscripción del mismo curso y el precio reducido de \$50.00 dólares se reflejará automáticamente en su carrito de compras.
- Solo se podrá extender el plazo de un examen o curso cuando el estudiante tenga una **calificación DN o no presentó el examen**. La extensión no es transferible entre los estudiantes, tampoco se permite el cambio para otros cursos.
- La extensión de \$50.00 dólares para el mismo curso y examen se debe adquirir en un plazo máximo de 30 días contados a partir de la fecha de vencimiento del examen. **Después del plazo máximo de 30 días (un mes)** se cobrará el curso a precio de lista.

### Estudiantes con necesidades especiales

LOMA se esfuerza al máximo para dar solución a los requerimientos de estudiantes con necesidades especiales mediante la concesión de permisos para hacer acuerdos específicos dependiendo de cada caso. Contacte las Oficinas de LOMA para obtener más información.



## Presentar los Exámenes de Autoestudio y los Cursos Cortos en Línea

LOMA ofrece un examen para cada curso que haga parte de una titulación profesional o de los cursos cortos en línea para evaluar el dominio de cada estudiante en el contenido del curso.

### Estos exámenes se presentan para los:

- **Cursos de Autoestudio:** PFSL 100, PFSL 280, PFSL 290, PFSL 301, PFSL 307, PFSL 320, PFSL 356, UND 386: El examen se presenta en un formato electrónico y requiere instalar la aplicación I\*STAR. Estos exámenes son administrados en las compañías miembros o no miembros de LOMA que estén registradas y autorizadas para la toma de exámenes. Para más información consulte con el Representante Educativo de su compañía. También existen algunas localidades aprobadas por LOMA para administrar exámenes a estudiantes independientes. Las fechas para rendir el examen son a la discreción de cada compañía y se presentan dentro del plazo de cada inscripción.
- **Cursos Cortos en Línea:** Los exámenes están integrados en el curso y se presentan en línea. No se requiere ninguna aplicación adicional para presentar el examen.

### Exámenes en I\*STAR

I\*STAR™ (Individually Scheduled Test and Results) es la aplicación de LOMA para tomar los exámenes. Estos exámenes estarán disponibles para los estudiantes de las compañías que hayan instalado este sistema. Solo los Representantes Educativos autorizados por LOMA y supervisores de exámenes tienen acceso a esta aplicación. Para poder realizar un examen de práctica antemano y durante su tiempo de estudio, usted podrá utilizar el examen de prueba en el portal del curso.

Las ventajas de I\*STAR son:

- Comodidad y flexibilidad de poder presentar exámenes durante todo el año
- Obtener la calificación del examen en el momento de haberlo terminado
- Análisis de rendimiento del estudiante después del examen

### Matricularse para Exámenes en I\*STAR

Antes de realizar el examen final en I\*STAR, usted debe estar matriculado en el curso a través del sistema de LOMA [learning.loma.org](http://learning.loma.org).

Información importante sobre exámenes en I\*STAR:

- Las matrículas en I\*STAR no pueden ser canceladas después de 72 horas. Dentro del plazo de las 72 horas siguientes de su inscripción deberá comunicarse con LOMA para que esto sea corregido sin ningún cargo.
- Si por alguna razón usted no presenta el examen dentro del plazo listado en su matrícula, éste ya no será válido a menos que se compre una extensión de examen. **Nota:** Consulte la sección del catálogo en donde encuentra, extensión del examen.
- Las matrículas no son transferibles entre estudiantes o entre cursos.
- No está permitido cambiar de curso sin pagar por el nuevo curso. Las devoluciones o créditos no serán realizados por el curso para el que inicialmente se matriculó.

Su nombre de usuario y su contraseña serán necesarios en el momento de tomar su examen.

Los procedimientos y las condiciones del lugar en donde se toman los exámenes de I\*STAR son específicas y bastante estrictas y deben ser aplicadas por la persona encargada de vigilar el examen, estos procedimientos están en el formulario de certificación de I\*STAR disponible en la página Web de LOMA.

### Presentar Nuevamente el Examen en I\*STAR, si No Aprobó

En el caso que un estudiante no apruebe un examen en I\*STAR, podrá matricularse nuevamente en el curso con un descuento de \$30 USD sobre el precio de lista.

El estudiante se deberá inscribir en el mismo curso dentro de un plazo máximo de seis meses después de haber presentado el examen inicial. El plazo para cancelar cualquier matrícula es de 72 horas contando desde el momento en que se realizó la transacción. Transcurrido este plazo, LOMA no podrá hacer ningún cambio en su matrícula.



## Violaciones de los Procedimientos para la Administración de Exámenes

Para proteger las acreditaciones de LOMA y al mismo tiempo para asegurar la credibilidad y los derechos de las organizaciones e individuos participantes en los programas de LOMA, hemos establecido un procedimiento específico que se utiliza cuando encontramos que las normas que rigen el examen han sido violadas o se sospecha de falencias en la administración del examen.

Este procedimiento implica:

1. Determinar la existencia de una posible violación
2. Investigar la sospecha de violación
3. Comunicar a las partes afectadas las conclusiones de la investigación y las sanciones que han de ser impuestas en caso de haber alguna.

Si necesita más información al respecto, el proceso completo puede ser encontrado en nuestra página Web: [www.loma.org](http://www.loma.org).

### Para más Información:

#### Departamento Internacional de LOMA

**Teléfono:** 770-984-3730

**Fax:** 770-984-6420

**Correo electrónico:** [intl@loma.org](mailto:intl@loma.org)

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## Diploma, Calificaciones, Costo y Duración del Examen

### Certificados y/o Diplomas

El reconocimiento de los logros y la motivación de los estudiantes son fundamentales en nuestra misión educativa.

Con la finalización y la aprobación de los cursos se le entregará un **certificado o diploma** que acreditará los conocimientos aprendidos durante el curso:

- Certificado Personalizado al culminar los dos primeros cursos de Autoestudio PFSL 280 Y PFSL 290 (nivel 1)
- Diploma Personalizado al culminar cualquier Titulación Académica,
  - **PFSL**
  - **ALMI**
  - **ACS**
  - **LCIC**

LOMA no entrega certificaciones individuales por cada curso aprobado.

Los diplomas mencionados anteriormente se le enviarán por correo físico al Representante Educativo aproximadamente 10 semanas después de terminar y aprobar el último curso que lo haga acreedor de la titulación académica.

En caso de extraviar su diploma, puede ser reemplazado por un valor de \$35 USD. Para obtener un formulario de reemplazo, consulte [www.loma.org](http://www.loma.org), en la sección de aprendizaje y desarrollo, bajo la opción de Representantes Educativos.

### Calificación de Exámenes y Análisis de Rendimiento

La calificación mínima para aprobar los exámenes de LOMA es del 70% para todos los cursos. LOMA provee a los estudiantes sus calificaciones si obtienen un porcentaje de 70 o superior. Los puntajes inferiores al 70% aparecen sólo como F + (significa que el estudiante estuvo a menos de 10 puntos porcentuales de pasar el examen), o F si la calificación obtenida fue de menos de 60%.

Observaciones:

- Si usted no toma su examen antes que se termine el plazo para el curso al cual está inscrito, su puntuación será DN (significa que no presentó el examen).
- Análisis de rendimiento: Todos los exámenes de I\*STAR contienen un reporte de desempeño para su revisión. Este reporte contiene el porcentaje de preguntas por capítulo **contestadas** correctamente. Para mayor información ingrese a su expediente académico y seleccione la opción, “reporte de desempeño” en la casilla acción.
- Puede retomar el examen si no lo aprobó, con un descuento sobre el precio de lista. Consulte en la sección “Presentar los Exámenes de Autoestudio”.



## Costo y Duración del Examen

### Desafíos con Preguntas en el Examen

Si usted cree que una pregunta de su examen de I\*STAR fue dudosa, injusta, o contiene errores, puede pedir una revisión de dicha pregunta en su examen.

Puede enviar un e-mail a [education@loma.org](mailto:education@loma.org) o un fax al 770-984-3742.

### Tarifas de los Exámenes de I\*STAR

Las tarifas de los exámenes se basa en el estatus de una compañía al ser o no miembros de LOMA, al igual que el tipo de examen (I\*STAR), y el lugar donde se administra el examen. El valor del curso cubre el costo del examen, la revisión y el crédito para la titulación académica.

Los alumnos independientes deberán pagar las tarifas en el momento de la inscripción. Las empresas miembros y no miembros serán facturadas por el valor de los exámenes. Todas las tarifas están expresadas en dólares americanos y se deben pagar en dólares americanos con tarjeta de crédito VISA, MasterCard, American Express, o por medio de transferencia bancaria. Las inscripciones no son transferibles entre los estudiantes, ni se permite el cambio de cursos.

## Tarifas de Cursos y Exámenes 2018 — América Latina (Español)

Curso	Compañías		# de preguntas	Duración del examen # horas	¿Que está incluido en el precio de curso?
	Miembros de LOMA	No Miembro/ Estudiante Independiente			
PFSL 100	\$161	\$322	75	3	Incluye el Material para autoestudio en formato PDF + examen I*STAR
PFSL 280	\$144	\$288	75	3	Incluye el Material para autoestudio en formato PDF + examen I*STAR
PFSL 290	\$144	\$288	60	2	Incluye el Material para autoestudio en formato PDF + examen I*STAR
PFSL 301	\$144	\$288	75	3	Incluye el Material para autoestudio en formato PDF + examen I*STAR
PFSL 307	\$144	\$288	60	2	Incluye el Material para autoestudio en formato PDF + examen I*STAR
PFSL 320	\$144	\$288	75	3	Incluye el Material para autoestudio en formato PDF + examen I*STAR
PFSL 356 <sup>1</sup>	\$111	\$222	75	3	Incluye solamente el examen I*STAR y acceso a la guía de preparación en el formato PDF <sup>1</sup>
UND 386	\$335	\$468	50	2	Incluye el Material para autoestudio en formato PDF + examen I*STAR

Por favor notar que estos precios son válidos para los cursos LOMA sólo en español. Las tarifas pueden variar dependiendo de la localidad.

<sup>1</sup> **PFSL 356** incluye el valor del examen y el acceso a la guía de preparación (TPG) en PDF. El **libro físico** de estudio se deberá adquirir a un **costo adicional** a través del distribuidor PBD al web: <https://www.lomabookstore.com>

Otros Cargos	Compañías Miembros	Compañías “No Miembro” y Estudiantes Independientes
Costo para extender el plazo del curso o examen <sup>1</sup>	\$50	\$50
Presentar Nuevamente el Examen I*STAR, si No Aprobó <sup>2</sup>	\$30 (Descuento del precio de Lista)	\$30 (Descuento del precio de Lista)
Reemplazo de Certificados	\$35	\$35
Transcripciones de Calificaciones y Cursos de LOMA	\$35	\$35

<sup>1</sup> Para leer las condiciones, Consulte en la sección **Extensión del Examen**

<sup>2</sup> Para mayor información Consulte en la sección **Presentar Los Exámenes de Autoestudio (Este descuento solo aplica para I\*STAR)**



# Fees and Schedules

## Enrollment Fees

Enrollment fees vary by course and are based on a company's LOMA membership status, the type of course delivery format selected, and the location where the course will be administered. Participation in LOMA Education Programs or activities does not constitute LOMA membership, nor does it qualify an organization for member company rates. To receive your company's membership benefits of lower course enrollment fees, be sure that your company's Organization/Company ID is entered in your Learning Account profile in LOMA's learning system. Contact your company's Ed Rep to request this information.

The chart on page 75 shows the LOMA discounted member and non-member course enrollment fees for courses delivered in North America. Log in to your LOMA learning record for pricing specific to your membership status, course delivery format, and geographic location.

Fee exceptions for independent students are available online at [www.loma.org](http://www.loma.org).

## Prometric Fees

Prometric charges several fees in addition to the course enrollment fees. Be sure to consult the table of Prometric fees on page 75–76 for more information.



English-Language 2018 Course/Exam Enrollment Fees — North America

Designation Courses	Discounted Member Price				Non-Member Price			
	Exam Delivery Format				Exam Delivery Format			
	Highly Interactive Online	Course Portal			Highly Interactive Online	Course Portal		
I*STAR		Prometric	Paper	I*STAR		Prometric	Paper	
<b>ALMI/FLMI Programs</b>								
LOMA 280, 290		\$225	\$320	\$255		\$450	\$545	\$510
LOMA 281, 291	\$225				\$450			
LOMA 301, 307, 320		\$265	\$360	\$290		\$530	\$625	\$580
LOMA 302, 308, 321	\$265				\$530			
LOMA 311, 335, 357, 361, 371		\$307	\$402	\$332		\$614	\$709	\$664
<b>ASRI/FSRI Programs</b>								
SRI 111, 121, 131	\$240				\$360			
SRI 210, 220, 230	\$280				\$420			
SRI 500		\$320	\$415			\$480	\$575	
<b>Specialized Courses/Associate Programs</b>								
ACS 100		\$285	\$380	\$310		\$570	\$665	\$620
ACS 101	\$285				\$570			
AIRC 411, 421	\$325				\$650			
ARA 440 <sup>1</sup>		\$340	\$435			\$680	\$775	
UND 386 <sup>1</sup>		\$340	\$435			\$680	\$775	
<b>Short Online Courses</b>								
<b>LOMA-Owned Courses</b>								
LOMA short online courses		\$50				\$100		
LOMA short online course collections		\$110				\$220		
<b>Partner-Owned Courses</b>								
LOGiQ <sup>3</sup>		\$100				\$200		
LRN		\$100				\$200		
North American Training Group		\$50				\$100		

**Note:** Prices are subject to change without notice.

<sup>1</sup> Effective January 1, 2018, the proctored examinations for **ARA 440** and **UND 386** will be available in I\*STAR and Prometric formats only. Paper exams will no longer be offered for these courses.

**Additional Fees**

Additional Course/Exam Fees			
	I*STAR	Prometric	Paper
Canadian surcharge <sup>1</sup>	\$20	\$20	\$20
Late enrollment fee <sup>2</sup>			\$50
Missed deadline fee <sup>2</sup>			\$125
Discounted course extension <sup>3</sup>	\$50	\$50	\$50

- <sup>1</sup> Certain exams administered in Canada, including those for independent students, are subject to a \$20 (U.S.) per exam surcharge. This fee is in addition to the base exam fee and other applicable fees. The Canadian surcharge applies only to FLMI exams and the exams for ACS 100 and ACS 101. All exams administered in Canada are subject to the Canadian Goods and Services Tax (GST). The GST applies to the course/exam fee, the Canadian student surcharge, and any applicable Prometric Fees. LOMA does not collect the GST; Canadian companies and independent students must self-assess any liability they incur.
- <sup>2</sup> Enrollments received after paper enrollment deadlines require additional administrative processing; therefore, a late fee per student, per exam is charged. Late enrollment and missed deadline fees apply to paper exams only.
- <sup>3</sup> If you re-enroll in I\*STAR or Prometric courses within one month of the end of your course access period, or for the next paper exam administration cycle for paper exams, you qualify for the discounted course extension fee. Otherwise, you may re-enroll at the full course price.

**Note:** Prices are subject to change without notice.

**2018 Paper Exam Schedule**

May 2018					
Time	Monday May 14	Tuesday May 15	Wednesday May 16	Thursday May 17	Friday May 18
9 a.m.	LOMA 280	LOMA 290	LOMA 301	LOMA 311	LOMA 320
1 p.m.	LOMA 335	LOMA 357	LOMA 307 ACS 100	LOMA 361	LOMA 371

November 2018					
Time	Monday November 5	Tuesday November 6	Wednesday November 7	Thursday November 8	Friday November 9
9 a.m.	LOMA 280	LOMA 290	LOMA 301	LOMA 311	LOMA 320
1 p.m.	LOMA 335	LOMA 357	LOMA 307 ACS 100	LOMA 361	LOMA 371

**Important Note:** Effective January 1, 2018, the proctored examinations for ARA 440 and UND 386 will be available in I\*STAR and Prometric formats only. Paper exams will no longer be offered for these courses.

### English-Language Exams and Study Materials by Course

The table below shows exam and study material details for each designation course LOMA offers. (\*STAR exams are available for all courses with a proctored exam.) All paper exams must be administered according to LOMA's official

schedule (see page 76). U.S. and Canadian students whose companies do not offer exams via \*STAR may sit for exams in a Prometric Testing Center. Students should contact their Ed Rep for details.

Course number	Exam Details			Study Materials	
	Number of questions	Time limit	Paper exam available	Enrollment includes	Textbook available for purchase
ACS 100	60 questions	2 hours	Yes	Course Portal, PDF of text and TPG	Yes
ACS 101	60 question total across all end-of-module exams			All study materials in online format	
AIRC 411	50 question total across all end-of-module exams			All study materials in online format	
AIRC 421	50 question total across all end-of-module exams			All study materials in online format	
ARA 440	50 questions	2 hours	No	Course Portal, PDF of text and TPG	Yes
LOMA 280	60 questions	2 hours	Yes	Course Portal, PDF of text and TPG	Yes <sup>1</sup>
LOMA 281	60 question total across all end-of-module exams			All study materials in online format	
LOMA 290	60 questions	2 hours	Yes	Course Portal, PDF of text and TPG	Yes
LOMA 291	60 question total across all end-of-module exams			All study materials in online format	
LOMA 301	60 questions	2 hours	Yes	Course Portal, PDF of text and TPG	Yes
LOMA 302	60 question total across all end-of-module exams			All study materials in online format	
LOMA 307	60 questions	2 hours	Yes	Course Portal, PDF of text and TPG	Yes
LOMA 308	60 question total across all end-of-module exams			All study materials in online format	
LOMA 311	60 questions	2 hours	Yes	Course Portal, PDF of text and TPG	Yes
LOMA 320	60 questions	2 hours	Yes	Course Portal, PDF of text and TPG	Yes
LOMA 321	60 question total across all end-of-module exams			All study materials in online format	
LOMA 335	60 questions	2 hours	Yes	Course Portal, PDF of text and TPG	Yes
LOMA 357	60 questions	2 hours	Yes	Course Portal, PDF of text and TPG	Yes
LOMA 361	60 questions	2 hours	Yes	Course Portal, PDF of text and TPG	Yes
LOMA 371	60 questions	2 hours	Yes	Course Portal, PDF of text and TPG	Yes
SRI 111	60 question total across all end-of-module exams			All study materials in online format	
SRI 121	60 question total across all end-of-module exams			All study materials in online format	
SRI 131	60 question total across all end-of-module exams			All study materials in online format	
SRI 210	60 question total across all end-of-module exams			All study materials in online format	
SRI 220	60 question total across all end-of-module exams			All study materials in online format	
SRI 230	60 question total across all end-of-module exams			All study materials in online format	
SRI 500	40 question proctored exam (2 hours) plus two written application assignments			Course Portal with required online component, PDF of text, and application	
UND 386	50 questions	2 hours	No	Course Portal, PDF of text and TPG	Yes <sup>1</sup>

<sup>1</sup> Subject to availability; quantities are limited.

# Make Your Company a Cx Game Changer!

Having an exceptional customer experience can be a game-changing strategy for your company...but are all your employees helping you win?

LOMA's new gamified course, ***Impact Cx: The Quest***, can support your customer experience initiatives by helping employees:

- Learn how THEY impact the customer experience and the bottom line, even if they aren't talking directly to customers
- Recognize which areas of the company affect the customer experience at key touchpoints
- Become customer experience advocates

Designed for cost-effective, large-scale implementation, ***Impact Cx: The Quest*** can be easily added to your company-specific training and education. Find out how you can kick start your company's customer experience initiatives with ***Impact Cx: The Quest***.



Find out more at [loma.org/impactcx](http://loma.org/impactcx) or contact us at [membersolutions@loma.org](mailto:membersolutions@loma.org).

