

Insurance Advisor

Diploma

Program Objective

This program provides students with the necessary skills and knowledge required to work in the insurance industry in a variety of different capacities, and may include careers within a call centre environment. It prepares students to write the provincial licensing examination. In addition, the program introduces students to different practices and positions within the industry. Students also gain skills and experience in using the most commonly used insurance database and quoting software in Canada. The Academy of Learning is currently the only organization in Canada offering a program that incorporates license preparation training along with actual hands-on experience with insurance products.

Duties & Responsibilities

Insurance Advisors work in an environment that ranges from administrative to technical work. The insurance industry expects individuals to uphold their professionalism. Their duties may include:

- Answering inquiries from customers both on the telephone and in person
- Providing information on the organization's products and services
- Processing miscellaneous documentation
- Updating and extracting client data
- Maintaining updated and confidential files
- Ensuring accurate documentation of all transactions
- Completing forms
- Using relevant software applications proficiently
- Communicating clearly with customers and colleagues
- Working effectively in a business office

Personal Attributes Required

- Embrace and incorporate on-going change
- Keep abreast with continuing education requirements
- Envision and grasp new concepts
- Critically analyze issues that arise on a daily basis
- Present information clearly and succinctly
- Manage use of time effectively
- Work both independently and as part of a team
- Receive constructive criticism in a positive manner
- Make decisions and solve problems
- Communicate complex wordings and ideas in simple terminology, both verbally and in writing

Career Opportunities

Recent studies indicate a shortage of qualified candidates across the country. A huge demand is expected over the next few years. Careers that correspond with the skills learned in this program include:

- Insurance Advisor
- Insurance Broker
- Insurance Agent
- Customer Service Representative
- Sales Representative
- Account Manager
- Underwriter
- Underwriter Assistant
- Claims Assistant

Admission Requirements

Grade 12 or equivalent or Mature Student status.

Courses are open to any applicant who possesses a good command of the English language and is able to follow instructions.

An admissions interview will be administered to determine if the applicant has the required interest, motivation, and entry-level skills to take this program.

Full-time students must attend the required hours per week as per the course schedule and may do so at times convenient to them.



Program Notes

Financial assistance may be available to qualified students.

Graduation requirements:

Students must achieve a 75% program average to obtain a diploma.

Competencies upon Completion

CORE COURSES

- **Keyboarding**
Minimum 25 words per minute (WPM)
- **Business Skills**
Business Verbal Communication, Customer Service, Principles of Selling
- **Office Skills**
Personal Computer Fundamentals for End Users and basic level of proficiency in Microsoft Outlook
- **Word Processing**
Basic level of proficiency in Microsoft Word
- **Operating Systems**
Basic level of proficiency in a Windows operating system
- **Database Management**
Advanced Level of proficiency in Microsoft Access
- **Spreadsheets**
Basic level of proficiency in Microsoft Excel
- **Insurance**
Skills & Practices of Insurance and Fundamentals of Insurance
- **Job Readiness/Employability Skills**
Job Search and Resume Writing and Thought Patterns For a Successful Career