

## **CPE CREDITS FOR MAKING MONEY IN INSURANCE**

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The *Making Money in Insurance* course is part of PSI's *Inside Insurance*® curriculum, provides a fundamental understanding of how insurance companies make money and track their financial performance.

### **Course Objectives**

Upon completing this course, students will be able to:

- Identify the sources of revenue and expense for insurance companies
- Recognize the information found on insurance company financial statements
- Explain key performance indicators (KPIs) used in the industry
- Recall sources of financial information
- Use financial information to better understand specific companies

### **Eligibility**

If you are a CPA licensed in the United States, you may be eligible for Continuing Professional Education credit for this course. This course offers 1 CPE credit.

Performance Solutions International (PSI) is registered with the National Association of State Boards of Accountancy (NASBA), as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to NASBA through its website: [www.learningmarket.org](http://www.learningmarket.org).

### **CPE Completion Requirements**

To gain CPE credit, you must complete the course and prove successful completion by passing the Final Test (with a 70% grade or better) within one-year from date of purchase. PSI will track your date of purchase and completion date and enforce this policy. If your company licenses the program and it is hosted with PSI, PSI will track your initial log-on date and only award CPE credit if you complete the course and pass the test within one year of the first time you've logged onto the course.

### **Field of Study**

Specialized Knowledge

### **Program Level**

Basic Level - This course is for anyone new to the industry or for anyone that wants a big picture understanding.

### **Course Prerequisites and Advance Preparation**

None

### **Delivery Method**

QAS Self-Study. The course is delivered either via PSI's hosted site or a company's internal learning management system.

### **Program Review**

PSI reviews the program content to ensure that it remains current. This version of the course was updated in April 2023.

### **Refund Policy**

If you are not completely satisfied with the program within 30 days of purchase, PSI will refund your money (if you are an individual user). If you are an organization wishing to license the program and wish to discuss PSI's refund policy, please contact Christopher Lawton at either 1 (866) GOTO PSI (choice # 3) or (973) 895-6061. Chris can also be reached at [clawton@goto-psi.com](mailto:clawton@goto-psi.com) or by fax at (973) 895-4238. A refund policy will be discussed and agreed-upon. PSI would like to make sure that you are fully satisfied with our services and will refund your money if you are not entirely satisfied.

### **Complaint Resolution**

If you are not completely satisfied with this course, contact PSI at 1 (866) GOTO-PSI, option # 3 and discuss your complaints. All incoming complaints are documented and forwarded to the Administrator. After resolution, documentation is kept in a complaint file for five years and it is used for consideration during course updates and improvements. PSI's contact for complaints is Christopher Lawton (or David Tompkins in Chris' absence). Chris and David may be reached by telephone at 1 (866) GOTO PSI (choice # 3).



### **Program Registration Requirements**

Contact PSi directly at 1 (866) GOTO-PSi to register. If this program is offered through your company, contact your training administrator for registration details and they will make arrangements with PSi to obtain a licensed copy for you.

To contact a PSi account executive to discuss pricing and the options for your organization, please call our toll free number at 1-866-GOTO-PSi (1-866-468-6774), and dial option # 1. You can also e-mail us at [info@goto-psi.com](mailto:info@goto-psi.com). PSi also offers an entire insurance curriculum. You can also visit our website at [www.goto-psi.com](http://www.goto-psi.com) for additional information on our company as well as the services we offer.

Performance Solutions International is pleased to have this opportunity to assist our clients in achieving their goals within the insurance industry. If you have any comments on our approach or program or would like to recommend any improvements, please let us know.

Our goal is to enhance your effectiveness in the insurance industry!