

2020 Registration Booklet

The Institutes' Exams (January 2020 Update)



Note: Use this booklet to register for all Institutes windows based exams except AAI® segmented exams offered through state associations. For those AAI segmented exams, see registration materials provided by the class sponsor. Additional special instructions for international examinees are presented on page 13. For the most current study materials and exam information, please view the electronic version of this registration booklet on our website, TheInstitutes.org.

Personal Information and Confidentiality

Updating Personal Information: At any time you may contact The Institutes at (800) 644-2101 to update your personally identifiable information, and opt-in or opt-out of any service. We will provide opt-in and opt-out opportunities as applicable to the service or product being offered.

Acceptance of The Institutes Privacy Statement: Enrolling in any Institutes course, registering for an exam or holding an Institutes certification or designation indicates your knowledge and acceptance of The Institutes Privacy Statement. For more details, please visit TheInstitutes.org/privacy.

Exam Information and Study Materials

Computer Exam Administration: Computer administration is the method for test delivery unless otherwise noted. Most of the Institutes' computer-based examinations are administered in a two month time period called a testing window. Dates for the testing windows are:

- January 15-March 15
- April 15-June 15
- July 15-September 15
- October 15-December 15

Current Study Material: Course guides and textbooks are revised periodically. Be sure you have the correct edition of the course guide and textbook(s) for the testing window in which you plan to take your exam.

If you register by telephone, ask a Customer Success representative about study materials, or email your question to CustomerSuccess@TheInstitutes.org. Provide information about both the exam and the testing window in which you plan to take an exam. Information about The Institutes' educational programs is available at our website and in our catalog, which can be downloaded from the website.

Segmented Exams: Some computer exams are offered in a segmented format. The segmented exam delivery method breaks a traditional exam into two to four separate exams that are shorter in length than a traditional examination. Examinees prepare for and take each segment individually; passing all segmented exams for a single course earns credit for the entire course. Segmented exams are available on computer for many of the courses in the AAI, AINS, AIC, API, ARM, and SPPA programs at Prometric Testing Centers and on-site testing centers.

25-30 Multiple Choice Question Exams: 45 Minutes	
ACSR 1-7,10,11,12	
30 Multiple Choice Question Exams: 1 Hour	
ACSR 8, 9	
Segmented 15-40 Multiple Choice Question Exams: 1 Hour	
AINS 21, 22, 23, 24	SPPA 30
AIC 30, 31, 32, 37, 39, 41, 44	AAI 81, 82, 83
ARM 400, 401, 402	WCCA 10, 11, 12, 14, 15
API 28, 29	
40-65 Multiple Choice Question Exams: 1.5 Hours	
CPCU 500	AFSB 151
API 28, 29	SPPA 30
AIC 37, 41, 47	AU 60, 61, 62, 67
AAI 87	AIAF 114,115
Cyber 301	AIDA 181, 182
PRC 320	
50-90 Multiple Choice Question Exams: 2 Hours	
AINS® 21, 22, 23, 24	AIC™ 30, 31, 32, 39, 44, 48, 49
AIS 25	AAI® 81, 82, 83
AIM™ 40, 44	AIT™ 134
ARM™ 400, 401, 402	AFSB® 152, 153
APA® 91, 92	ANFI® 205, 206
AMIM® 121,122	CPCU 520, 530, 540, 551, 552, 553, 555, 556, 557
ARe™ 143, 144	IR 201
ASLI™ 163, 164	SM 18, 19
CA 1, CA 2, iCAS/ISCM CR2B	WCCA™ 10, 11, 12, 14, 15
Ethics 311, 312	
WCCP® 16, 17, 18, 20	
100 Multiple Choice Question Exams: 3 Hours	
iCAS PC1	iCAS ISCM CR2A
iCAS DS1	

Important Program Information and Changes

Please read before registering.

Course guides and textbooks are revised periodically. Be sure you have the correct edition of the course guide and textbook(s) for the testing window you plan to take your exam. Check with The Institutes' Customer Success to verify that your study material matches the exam.

Online Courses

- Some Institutes courses such as Ethics 311 and 312, ANFI 206, and courses in WCCA and ACSR are available year-round.
- Ethics 311 and 312, ANFI 206, WCCA, and ACSR exams are available online only and are not offered at Prometric Testing Centers.
- ANFI 206 and WCCA exams are open-book exams.
- A proctor is required for ANFI 206, WCCA, and ACSR exams. Please refer to page 10 or contact Customer Success at (800)644-2101 for a list of acceptable proctors.

Ethics Requirement

- To earn an Institutes designation, you must pass the exam for either Ethics 311 or Ethics 312. If you plan to pursue the CPCU designation, you should take the Ethics 312 course instead of Ethics 311.
- Both Ethics exams have 50 questions and are offered free of charge.
- There is a nominal \$5.50 administrative fee to process continuing education (CE) credit for passing an ethics exam.
- For more information or to register, go to TheInstitutes.org/ethics or call Customer Success at (800) 644-2101.

New Associate in Risk Management (ARM™) Designation

- ARM 400 – Risk in an Evolving World
- ARM 401 – Holistically Assessing Risk
- ARM 402 – Successfully Treating Risk
- Master relevant and emerging risk management concepts with the all-new Associate in Risk Management (ARM™) designation.
- Developed with input from industry experts, our online courses use video, graphics, real-world expertise, and interactive testing to help you learn, retain, and apply the knowledge you need to advance your career.
- Visit TheInstitutes.org or call Customer Success at (800)644-2101 for more information.

October 2019 Course Revisions:

The following study materials were revised:

- CPCU 530 – Business Law for Insurance Professionals: 2nd Edition
- ANFI 205 – 2019 FEMA Manual

The exams based on the previous study materials were available until December 15, 2019.

The exams will be based on the newly revised content effective January 15, 2020.

January 2020 Course Revisions:

The following study materials are being revised:

- AIM 40 – Contemporary Management: 11th edition
- AIDA 181 – Big Data Analytics for Risk and Insurance: 3rd edition
- AIDA 182 – Risk and Insurance Analysis Techniques: 2nd edition
- CYB 301 – Managing Cyber Risk: 3rd edition

The exams based on the previous editions are available until March 15, 2020.

The exams will be based on the newly revised content effective April 15, 2020.

Expiring Courses

The courses listed below are expiring on March 15, 2020:

- ARM 54 – Risk Management Principles and Practices
- ARM 55 – Risk Assessment and Treatment
- ARM 56 – Risk Financing
- ERM 57 – Enterprise Risk Management
- RMPE 352 – Risk Management for Public Entities

Important: Starting on April 15, 2020, The Institutes will offer exams on new ARM courses only.

Planning for Your Exam

General Exam Information	
Exam Format	Exams are administered on the computer. Computer administered exams are preceded by an optional 30-minute tutorial and are followed by a brief survey.
Testing Centers	<p>Computer exams are administered at Prometric Testing Centers and at Institutes-approved on-site testing centers, usually an employer facility.</p> <p>On-site testing centers: Visit The Institutes' website at TheInstitutes.org/register/examlocations.htm to locate a center.</p> <p>Prometric Testing Centers: Prometric centers are located in more than 550 cities in 160 countries. Log on to Prometric.com/TheInstitutes to find a center. Examinees must arrive at Prometric Testing Centers at least 30 minutes before a scheduled appointment for check-in. A late arrival could result in a Did Not Sit (DNS) appointment cancellation and loss of the entire registration fee.</p>
Fees	Fees vary by program, test location, and employment. See pages 11 and 12. Refer to page 10 for information about individuals who qualify for a reduced registration fee.
Registration Cancellations	Exam cancellation will result in forfeiture of the full or partial registration fee depending on the time of cancellation. See page 6 for cancellation and credit forfeiture policies.
Retesting	Examinees may take the same exam a maximum of two times during a given testing window and a maximum of four times during a calendar year. All exam retakes are subject to the full applicable exam registration fee.
Employer-Paid Exam Fees	Employer-paid fees are issued to the individual examinee's account. Fees are not transferable to another examinee. If you leave an employer before taking an exam, The Institutes will credit your former employer.
Special Arrangements	The Institutes make every effort to assist students who have disabilities that require special exam arrangements. We do not charge for this service, but we require current documentation of disability and a professional's explanation of how the disability affects your ability to take an exam. Submit a written request no later than the first day of the testing window for which you wish to register. Email Assessments@TheInstitutes.org to apply.

State Continuing Education Credit Examinee's Responsibility	
Important Note Regarding CE Filing:	
<ul style="list-style-type: none"> The Institutes file state CE credits according to the statutes of the state(s) in which you are licensed. It is your responsibility to understand the proctoring and test administration requirements in your state(s), particularly if you will test at an on-site location. Verify that the on-site testing environment, both the facility and the proctor, comply with state CE requirements before making an appointment. Failure to provide The Institutes with your current license information may result in state CE credits not being filed. Some states do not permit late reporting and some allow it with an extra fee. Any late filing fees and charges will be the sole responsibility of the student. To ensure prompt filing of your state CE credits, log in to The Institutes' website, TheInstitutes.org. When your account comes up, click on Learning Resources and scroll down and click on State Continuing Education Licensing Information. Or, call The Institutes before sitting for an exam to update your record. When you have passed the identified exam, The Institutes will file the CE credit in all requested states. Contact the applicable state licensing entity if you have questions regarding state CE requirements. 	

Exam Dates	
Testing Windows for Computer Administered Institutes Exams	<ul style="list-style-type: none"> January 15-March 15 April 15-June 15 July 15-September 15 October 15-December 15
International Institutes Exams (when computer administration is unavailable)	<p>Paper and pen administration of Institutes exams is available only at international locations, only when computer administration is not available, and is limited to four dates:</p> <ul style="list-style-type: none"> March 2, 2020 June 1, 2020 September 7, 2020 December 7, 2020
Select Exams Also Offered via Paper and Pen	Paper and pen exams administered in the workplace are available year-round. See a list of applicable exams on page 14. All other Institutes exams are available only during the dates listed above.

Preparing to Take an Institutes Exam

Examinees must register for an exam with The Institutes and then schedule an appointment to take the exam. Purchasing study materials does not register you for an exam. See registration instructions that follow and review page 2 for any special registration instructions for courses that have been revised.

Registering for an Exam	
How to Register	<p>Online: TheInstitutes.org</p> <p>Phone: (800) 644-2101 Monday–Friday 8 am to 6 pm ET</p> <p>Fax: (610) 640-9576</p> <p>Mail: 720 Providence Rd., Suite 100, Malvern, PA 19355-3433</p> <p>Registration Form (for mail-in or fax): See page 16 or see page 18 for information about Select Paper and Pen exams.</p>
Payment	The Institutes accept American Express, Diners Club, Discover, MasterCard, and VISA. Mailed registrations also may be paid by check or money order. Fees are nonrefundable and nontransferable and must be paid in U.S. currency.
Identification	Register for an exam using your name exactly as it appears on the valid government-issued photo ID with signature that you will present at the testing center. If you have any questions, call The Institutes before scheduling your appointment.
Computer Exam Registration Deadlines	See the chart on page 11 for exam fees and fee deadlines. While there is no registration deadline, anyone planning to register for an exam at a Prometric Testing Center or on-site during the final days of a testing window (which end on the 15th of March, June, September, December) should confirm that seats are available before registering. Otherwise, registering for an exam during a testing window in which you do not sit for an exam will result in a registration transfer fee to the next testing window.
Exam Registration Confirmation Notice	The Institutes send an electronic registration confirmation if an email address is provided. Please read the confirmation completely. Check it for accuracy, and notify The Institutes immediately if there is an error. A separate confirmation notice is sent for each exam registration. Registrants for a Select Paper and Pen exam must register three weeks before your preferred exam date. No confirmation notice will be sent. Rather, please confirm with your proctor that the test materials arrived in time for the selected test date.

Scheduling a Computer-Administered Exam Appointment

Schedule your appointment when you know you will be ready to sit for the exam. Otherwise, you could incur additional fees. See pages 6 and 12.

- Prometric will charge a \$50 fee to students who reschedule their appointments within three to twelve business days prior to a test date.
- Transferring the registration to the next testing window will incur a transfer fee from The Institutes.
- Canceling a Prometric appointment within three days of a scheduled exam date will forfeit the entire registration fee. You will be charged the entire registration fee to sit for the exam at a later date.

Also, scheduling an appointment far in advance and then canceling could deprive another examinee of a desired testing date and time. Be considerate of others. Still, we do recommend scheduling the exam appointment early in the testing window in case the exam must be rescheduled or retaken. *This directive does not apply to select paper and pen examinees who choose a test date at the time of registration.*

Scheduling a Computer Exam Appointment

Appointment Waiting Period	<p>Online and Telephone Registration— Appointments can be made approximately 30 minutes after registering.</p> <p>Fax Registration—Wait two business days.</p> <p>Mail Registration—Wait two weeks.</p> <p>Or you may schedule an appointment immediately after receiving your Examination Registration Confirmation Notice.</p>
On-site Testing Centers	Examinees should communicate directly with the on-site testing center to schedule an appointment. The link to approved on-site testing centers displays as part of the exam registration process.
Prometric Testing Centers	To locate a Prometric Testing Center and schedule an appointment, log on to www.Prometric.com/TheInstitutes or call (877) 311-2525 between 8:00 AM and 8:00 PM Eastern Time Zone. A current registration for the desired testing window and an examinee's ID number are needed when scheduling an appointment. Prometric's international phone numbers are listed on page 13. Hours of operation vary.

The Institutes' Examination Rules of Conduct

- Unless otherwise noted, all exams are closed-book exams. Study notes, course materials, and any form of electronic device other than an acceptable calculator may not be used or consulted during your testing session.
- Communicating with anyone or anything other than the test center administrator during the testing session is prohibited. Further, I acknowledge that I have not received or had access to test questions other than during a previous test administration through an authorized agent of the Institutes.
- In accordance with the copyright notice below, any reproduction of these materials in whole or in part, contained in this examination, through any means, including, but not limited to, copying or printing of electronic files, reconstruction through memorization, and/or dictation, and/or dissemination of exam materials or derivative works through any form of verbal, electronic, or written communication is strictly prohibited.
- The scratch paper provided for your use during the examination must be returned to the test administrator as you leave the testing center. Answers written on the scratch paper, but not entered into the computer, will not be graded.
- If you must leave the testing station during the examination, you may do so for five minutes. However, the time remaining in the testing session will continue to run during your absence. Anyone leaving the testing room during a testing session still is bound by the Rules of Conduct.
- If you wish to report a problem with the administration or content of your examination, send your written comments to The Institutes within two weeks of this test administration date.
- You affirm that you are the named person who is scheduled to sit for this examination and all responses to exam questions will be determined by you and you alone.
- You understand and accept that test questions and your responses to the questions will not be returned under any conditions.
- You further agree and understand the Institutes will use data statistics/forensics and any other analytical tools to determine if an irregularity occurred during a testing session and the results of such an investigation can and will be used in a decision to invalidate your test result and to revoke permission to take future exams.
- By having made an appointment to sit for an Institutes exam you acknowledge and agree to be bound by the CPCU Code of Professional Conduct and/or the Institutes' Code of Academic and Professional Integrity.

© Information that is copyrighted by and proprietary to American Institute For Chartered Property Casualty Underwriters is included in this examination. Use of Institutes material by examinees is limited to use solely for the examination presented on this date. All other uses are prohibited by U.S. Copyright Law.

Failure to comply with the Rules of Conduct will be reported to The Institutes and appropriate action will be taken according to the Code of Academic and Professional Integrity, TheInstitutes.org/CAPI, which can include disqualification of your examination and restrictions on your taking future exams.

Rescheduling or Transferring an Institutes Exam

Rescheduling an Exam Appointment Within the Same Testing Window	
On-Site Testing Centers	On-site testing centers have their own policies and procedures for rescheduling. Contact the center directly.
Prometric Testing Centers	Before rescheduling an appointment within the same testing window, please note Prometric will charge a \$50 fee to students who reschedule their appointments within three to twelve business days of the original test date. There is no \$50 charge from Prometric to reschedule an appointment when the request is made greater than 12 business days in advance. Business days are defined as Monday-Friday, excluding holidays observed by Prometric. To change an appointment to another date within the same testing window, go to Prometric's website, www.Prometric.com/TheInstitutes , or call (877) 311-2525 at least three business days before the original appointment. A reschedule request less than three days before a test date will not be honored, and all fees will be forfeited if the exam is not taken. If you are within the three to twelve days window and you have a legitimate hardship that requires you to reschedule an appointment and that you believe would warrant an exception to the application of the rescheduling fee, please contact Prometric Customer Care directly at (800) 775-3926.
Transferring an Exam Registration to the Next Testing Window	
Transferring to the Next Testing Window	Presuming there are no rescheduling issues and the applicable transfer payment is made, an exam registration will remain valid for the next testing window. Contact The Institutes at least three business days before the scheduled exam date to transfer to the next testing window and pay a transfer fee. See chart on page 12 for applicable transfer fees.
Exam Transfer Deadline	If you do not have a scheduled appointment, to transfer a registration, you may call The Institutes up until the last day of the testing window for which you are registered. However, a transfer fee does apply.
Paper Exam Forms	A registration for a paper version of a computer-administered exam is not transferable to the next testing window. The exam must be administered within the scheduled testing window or the entire registration fee will be forfeited.

Exam Cancellation

Cancellation results in termination of a registration and the appointment if one was scheduled. Both can be canceled in one call to The Institutes. An examinee may be eligible for a partial fee credit from The Institutes if both the registration and the exam appointment are canceled within the required time frame. Exam fee forfeitures and credits will be issued according to the fee charts on page 12.

Exam Cancellation	
Canceling an Exam Registration	Go to The Institutes' website, TheInstitutes.org , or call The Institutes at (800) 644-2101 three or more business days before the scheduled appointment to cancel both the exam registration and the appointment at the same time. Cancellation will result in the forfeiture of some or all of a registration fee. See page 12.
Canceling an Appointment at a Prometric Center	An appointment can be canceled up to three days before the test date by going to Prometric's website, www.Prometric.com/TheInstitutes or by calling (877) 311-2525. Canceling your appointment through Prometric does NOT cancel your exam registration. You also must cancel your registration with The Institutes (see above). Otherwise, no credit will be granted. The current amount that is forfeited as a result of a cancellation is shown on page 12.
Cancellation Deadline	An exam registration for a Prometric Testing Center and the Prometric appointment must be canceled at least three business days before the appointment date. If no appointment is scheduled, a registration for an exam at either a Prometric Testing Center or an on-site location can be canceled up to the last day of the testing window.
No Prometric Cancellation Fee	A fee will not be imposed during the three to twelve business days before an appointment if the appointment is canceled and not rescheduled. If rescheduled to a date within the same testing window, a \$50 rescheduling fee will be assessed.
Canceling an Appointment at an On-Site Testing Center	Contact the testing center directly for cancellation policies and procedures. The Institutes must be informed prior to the close of a testing window if an examinee intends to cancel an on-site appointment to the next testing window. A transfer fee will be assessed. Failing to inform The Institutes before the close will forfeit the entire registration fee.
Cancellation Forfeiture	If a credit remains after a cancellation forfeiture, it can be applied to study material purchases or to a future exam fee. Forfeiture amounts vary by exam (see chart on page 12). Remaining credit is valid for two years from the date of issue.
Credit for Paper	The entire registration fee is forfeited if a paper exam is not taken during the registered testing window.

Conditions of Registration and Exam Administration

The Institutes reminds on-site testing centers that certain testing conditions must be met when administering an exam intended for CE credit. Still, examinees should verify those conditions are met when making an appointment and when taking an exam for a state CE credit.

Examinees who do not agree to abide by The Institutes' Rules of Conduct for exam administration at the time of taking the exam will not be permitted to sit for an exam and will forfeit the registration fee.

The security of its test questions and unfair advantages to examinees are primary concerns of The Institutes. To that end, Institutes examinations are copyright protected, and The Institutes use observational and statistical techniques to monitor and detect examination irregularities before, during, and after test administration.

In accordance with the copyright of Institutes examinations, any reproduction of examination materials in whole or in part, through any means, including, but not limited to, copying or printing of electronic files, reconstruction through memorization and/or dictation, and/or dissemination of exam material or derivative works through any form of verbal, electronic, or written communication is strictly prohibited.

Therefore, knowing examination questions are the exclusive property of The Institutes, at the time of registration you acknowledge:

- You shall not request, nor shall you secure test questions, voluntarily or involuntarily.
- You have neither had access to test questions for your examination nor have they been (are) in your possession by any of the means of transmission cited above before sitting for your exam.
- You shall not disclose the contents of your examination, voluntarily or involuntarily, following your test administration, by any of the means of transmission cited above.

Further, you consent to test center check-in and test administration security procedures as stated in The Institutes' Examination Rules of Conduct.

You will not be permitted to sit for an exam if you do not agree to abide by the rules of conduct statement presented on page 5 and restated at the beginning of exam administration and you will forfeit your registration fee.

Agreement

- Examinees testing at an on-site center and intending to use an Institutes exam toward state CE credit must understand and accept the obligation to verify that the proctor and testing center satisfy state CE requirements and conditions at the time of the exam administration.
- By registering for an Institutes examination, you understand and willfully agree to abide by the conditions under which The Institutes will administer an Institutes examination to you.
- CPCUs and CPCU candidates are subject to the CPCU Code of Professional Conduct. The CPCU code is available at: <https://www.TheInstitutes.org/doc/canons.pdf>.

Review and Investigation

The Institutes reserve the right to:

- Withhold and/or remove any scores The Institutes have reason to believe are not valid and/or were not earned independently by an examinee by reason of voluntary or involuntary outside assistance or cooperation by an examinee
- Use any legal means necessary to investigate a potential violation of examination integrity, and to take appropriate measures as a result of its findings, including expunging an examination result and expulsion from accepted candidacy
- Require the examinee to cooperate in the investigation of an examination irregularity, failure of which is grounds for immediate removal of the score(s) in question and examination expulsion
- Disqualify an exam result and take other disciplinary action if an examinee possesses a prohibited aid(s) during exam administration even if the examinee is not observed using the aid(s) during testing

The Institutes Privacy Statement

The Institutes privacy policy is available on The Institutes' website. Visit [TheInstitutes.org/privacy](https://www.TheInstitutes.org/privacy).

Confidentiality Requests

Customers may contact The Institutes at any time to request that we maintain the confidentiality of their personally identifiable information. To request that The Institutes maintain the confidentiality of your personally identifiable information you may use the Account Manager on The Institutes' website to request confidentiality or contact CustomerSuccess@TheInstitutes.org

Continuing Education

If registering for an Institutes examination as a confidential examinee, but requiring CE, you are aware of and approve of The Institutes' acquiring licensing information from national and state associations and organizations for the sole purpose of CE compliance. Acquired data will not be sold or provided to any third party.

Taking an Exam

The Institutes' goal is for every exam experience to be a positive one. To help ensure a smooth testing experience, please note our exam policies and rules.

Exam Policies	
Identification	You must present valid, government-issued identification that contains BOTH a photograph and a signature. The name on your ID must exactly match your name as it appears on the examination confirmation notice. If, for example, your identification and confirmation notice do not match because you recently married, bring the original copy of your marriage license. Contact The Institutes at least one week before your appointment if you have any questions about proper ID. If you are denied admission to a testing center because of a question about your ID, immediately call The Institutes at (800) 644-2101 or (610)644-2100. Do not leave the testing center without first calling The Institutes.
Incorrect ID Number	If your ID number is incorrect and you made the appointment under that number, take the exam and call The Institutes immediately afterwards.
Breaks	<ul style="list-style-type: none"> No breaks are scheduled during an Institutes examination. However, examinees may visit the restroom. When doing so, you are required to sign out and to sign in again. You must return to your testing station within five minutes; the examination clock will continue to run during your absence. Communicating with anyone other than a test administrator, visiting your locker, and referring to study material during your absence is all prohibited. The test administrator is not permitted to discuss or interpret the contents of the examination questions.
Problems During the Exam	Raise your hand if you encounter a problem during the exam. You may not communicate with anyone other than the test administrator.
Medical Condition Accommodation	Students requiring a medical or dietary supplement, such as those for a diabetic that will be taken to a Prometric Testing Center must submit the request to The Institutes for prior approval by Prometric, at least one month before the anticipated testing date. Send a full explanation of your needs to Assessments@TheInstitutes.org .
Provided Items for Electronic Exams	Scratch paper and a pencil will be provided and will be collected at the end of the exam. Answers written on scratch paper, but not entered into the computer, are not graded. Ear plugs and a basic calculator are available upon request at Prometric Testing. On-site centers do not provide calculators.

Information About Computer-Administered Exams	
Demo Exam	For a hands-on demonstration of computer-delivered essay or objective exam questions, visit The Institutes' website at TheInstitutes.org . Entering the phrase "demo exam" in the search box will take you to a screen that displays the Exam Demo tab.
Required Skill Level	Taking an Institutes exam on a computer does not require special computer skills. For objective exams, you can use a mouse or the keyboard to indicate an answer. To select your answer by using the keyboard, hold down the Alt key and then press the A, B, C, or D key.
Essay Exams	For essay exams, type your answers using the keyboard. Cut and paste and some other word processing functions are not available during the exam.
Mark for Review	You can Mark for Review any questions that you want to come back to later. You can set the question summary screen to show several options, such as which questions were answered and marked or just those that remain unanswered. You can practice Mark for Review with the Demo Exam.
Reference Tab	Financial value tables and various formulas that will assist in answering questions are available by clicking on the Reference tab in upper left-hand corner of the test administration. The tables and formulas then are selected by clicking from the list in the lower-left-hand of the screen. The Reference Tab will not appear in all exams and will display only in Part B of an examination. Not every exam calls for reference material.
No Imbedded Calculator	A calculator is not available as part of the test administration software. Examinees should provide their own Institutes-approved calculator. See page 9.

Prometric Testing Centers

Prometric's Test Security Procedures	<p>Security at Prometric Testing Centers is very stringent. Prometric Testing Centers reserve the right to ask examinees to turn out their pockets and to use a metal detector wand. Prometric Test Center Administrators (TCAs) will conduct strict inspections of any and all eyeglasses, jewelry and other accessories to inspect for camera devices that could be used to capture exam content. Security cameras and video recording are in constant use. Test Center administrators circulate within the testing room at least every 30 minutes.</p> <ul style="list-style-type: none"> All candidates will be required to remove their eyeglasses for close visual inspection by a TCA. These inspections will take a few seconds and will be done at check-in and again upon return from breaks. Jewelry outside of wedding and engagement rings is prohibited. Candidates should not wear other jewelry to the test center. Hair accessories ties, bowties, tie clips, and cuff links are subject to inspection. Candidates should refrain from wearing ornate clips, combs, barrettes, headbands, and other hair accessories, as they may be prohibited from wearing them in to the testing room and asked to store them in their locker. If a candidate is caught with a camera device prior to entering the testing room, the Prometric TCA will confiscate the item and the candidate will not be permitted to test. Institutes examinees will be given a locker key attached to a blue marker. The blue marker signifies that should a break be taken, examinees are (1) not permitted to revisit the locker, (2) not permitted to refer to any study material, and (3) not permitted to discuss the contents of the examination while away from the testing station. If a candidate is caught with a camera device while in the testing room, the TCA will confiscate the items and the exam will be terminated. Scratch paper is collected at the end of the exam and shredded.
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No Visitors at Testing Centers	Visitors and companions are not permitted to wait in the testing center.
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Inclement Weather	In the event of inclement weather, contact your Prometric Testing Center directly to determine whether the center is open. If the center is closed, contact The Institutes to make new arrangements. If the center is open and you do not take the exam, you will forfeit your entire registration fee.
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Scheduling a Prometric Appointment	Examinees are required to arrive at a Prometric Testing Center at least 30 minutes before the start of the exam. Keep this in mind when scheduling an appointment.
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Calculator Policy

Use of a Calculator	<p>Based on the contents of their study materials, examinees should determine for themselves if they need a calculator during an examination. If you plan to use your own calculator during your examination, take your registration confirmation notice to the testing center to verify The Institutes' criteria for an acceptable calculator.</p> <ul style="list-style-type: none"> A PDA or cell phone is not an acceptable calculator. Examinees may bring their own solar or battery-powered calculators, including business/financial calculator, as long as the calculators are: <ol style="list-style-type: none"> not equipped with alphabetic keys not capable of storing words not equipped with a paper tape Prometric Testing Centers will provide a <u>basic</u> calculator upon request. On-site testing centers do not provide any calculators to examinees. The test administration software does not provide an on screen calculator.
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Casualty Actuarial Society's Calculator Policy	<p>Examinees sitting for a CAS exam are restricted to use <u>only</u> the following Texas Instrument calculators:</p> <ul style="list-style-type: none"> BA-35 TI 30Xa BA II Plus BA II Plus Profession TI-30X II (IIS solar or battery) TI-30X MultiView (or XB battery)
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Before a Calculator May Be Used	<ul style="list-style-type: none"> The calculator must be removed from its case for inspection and the case placed in a locker or left with the proctor. Candidates may use more than one approved calculator during the examination. Calculator instructions cannot be brought into the examination room. Calculator instructions must be placed in a locker or left with the proctor.
After Using a Calculator	<ul style="list-style-type: none"> The calculator's memory must be cleared in the presence of the proctor before entering the testing room. The calculator's memory must be erased and the calculator must be turned off.

Resolving Calculator Issues	<ul style="list-style-type: none"> Bring your registration confirmation notice to the testing center to verify the criteria for an acceptable calculator. Call The Institutes at (800) 644-2101 from the testing center if you encounter a problem concerning the use of an acceptable calculator. Do not begin your exam. Do not leave the testing center. Any unapproved calculator brought to the testing center will be held by the proctor or placed in storage for the duration of the examination.
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Reduced Exam Fees

Teachers, Students, and Regulatory Employees within the United States or Its Possessions

The registration fee for a full semester computer exam is reduced by 50 percent of the Prometric Standard Exam Fee shown on page 11 if you are engaged **full time** as:

- A teacher or student in an accredited college or university
- An employee of a state or federal insurance regulatory agency (including IRES members)

You must submit the exam Registration Form and a letter from your college registrar, department head, or government employer specifying full-time status each time you register.

Restrictions apply.

The following exams types do not qualify for a reduced registration fee:

- Select Exams offered via Paper and Pen, CAS, segmented, paper and pen, and international paper and pen exams.
- The special fee provision does not apply to full-time students who are also employed full time.
- The discount for qualified examinees who take an exam at an on-site testing center will be based on the Prometric Standard Exam Fee, not on the On-site Exam Fee.
- To determine eligibility contact Customer Success at CustomerSuccess@TheInstitutes.org.

Reduced Fees and Scholarship for Active Duty Military and Reservists

The Institutes offer a 50 percent reduced exam fee, as explained above, to full-time active duty members of the United States military (Air Force, Army, Coast Guard, Marines, and Navy). We require proof of duty status for eligibility.

While deployed in a combat zone outside the continental United States, The Institutes will provide free exams and study materials to full-time active duty members of the United States military. For eligibility, we require proof of duty status and proof of deployment orders.

For further information, please contact Customer Success at CustomerSuccess@TheInstitutes.org.

Helpful Information and Exam-Taking Tips

We know exam days can be stressful, so we offer you the following information and suggestions:

- Exams contain both stand-alone and case-application questions.
- There is no penalty for guessing, so answer all questions.
- Answers written on the test center-provided scratch paper, but not entered into the computer, are not graded.
- Verify that all questions are answered before exiting. An examination cannot be restarted once you exit it.
- Know exactly where your testing center is located and how long it will take to get there.
- Appointments for computer-administered exams are scheduled for 30 minutes longer than the actual test length for examinees who would like to review the exam-taking tutorial. The 30 minutes cannot be used to extend exam time. The time remaining in the exam is displayed in the upper-right hand corner of the testing screen.
- No breaks are scheduled during an examination. An examinee who leaves the testing station to use the restroom must return within five minutes. Remaining exam time will continue to count down during the examinee's absence.

Acceptable Proctors

A proctor is required for ANFI 206, WCCA, and ACSR exams. An acceptable proctor must be one of the following:

- A CPCU designee (who is bound by the CPCU Code of Ethics)
- A member of the examinee's human resources or training department
- The examinee's supervisor or office manager
- A licensed insurance producer
- A military superior
- WCCA exams may also be administered by a colleague

Students who require state continuing education credit, other than that required for the licensing of California workers compensation adjusters, may be subject to additional or different proctor rules. If you have questions regarding proctor rules, please call Customer Success at (800)644-2101.

Exam Fees

Full Exams	Onsite	Prometric Early*	Standard Prometric
CPCU	\$285	\$320	\$400
AINS	\$145	\$180	\$260
AIC, AIDA, AIT, API, ARe, ARM, AU, CYB, PRC, SPPA, WCCP	\$195	\$235	\$315
AAI, AFSB, AIAF, AIM, AMIM, ANFI, APA, ASLI, IR	\$250	\$305	\$385
ERM**	\$260	\$355	\$435
AGPI, AIRP	\$120	N/A	N/A
SM, RMPE**	\$80	\$175	\$255
AIS 25	\$105	\$175	\$255
ACSR	\$65	N/A	N/A
WCCA	\$195	N/A	N/A
CAS	N/A	\$450	\$450
iCAS	N/A	\$427	\$427
Segmented Exams			
AINS 21, 22, 23, 24 (A,B,C)	\$70	\$115	\$175
AIC 37, 41, 43 (A,B)	\$120	\$165	\$225
AIC 30, 31, 32, 39, 44, 48, 49 (A,B,C)	\$85	\$140	\$200
API 28, 29 (A,B)	\$120	\$165	\$225
SPPA 30 (A,B)	\$120	\$165	\$225
ARM 400, 401, 402 (A,B,C)	\$85	\$145	\$205
AAI 81, 82, 83 (A,B,C)	\$110	\$165	\$225
ERM 57** (A,B,C)	\$130	\$190	\$250
WCCA 10, 11 (A,B)	\$120	N/A	N/A
WCCA 12, 14, 15 (A,B,C)	\$85	N/A	N/A

* Prometric early fee is charged on or before the first day of the testing window for which an examinee is registering.

** ERM and RMPE exams will not be given after March 15, 2020

The Institutes' courses and programs are dynamic in nature. To provide industry professionals with the knowledge needed to drive powerful business results, The Institutes continuously review and revise technical content and delivery methods based on current industry needs and practices. Therefore, course topics, program requirements, and pricing are subject to change at any time. Visit our website, TheInstitutes.org, or call Customer Success at (800) 644-2101, for the latest course and program information.

Transfer Fee

On-site: \$95
Prometric: \$120*

The fee required to transfer a registration to the next testing window is limited to the amount shown in this table if the examinee satisfies the transfer conditions noted on page 6. If the transfer fee is higher than the registration fee, the entire registration fee will be charged and a new registration is required. A registration for a paper/pen version of a computer-administered exam is not transferable.

Exam Cancellation Forfeiture

On-site: \$145
Prometric: \$185*

If the exam fee paid is less than the cancellation forfeiture, the entire fee is forfeited. Another full registration fee is required. The total amount of paper/pen exam registration fee is forfeited upon cancellation. Please see cancellation rules on page 6.

*Prometric Testing Note - Changes made to Prometric appointments are subject to a rescheduling fee or forfeiture of entire registration fee. See page 6.

Exam Grading

Multiple-Choice Exams	As soon as you complete the exam, you will receive an unofficial grade report, unless grading is delayed (see below).
Essay Exams	Essay exams are returned to The Institutes for grading. As many as three graders may independently review an exam to determine the final score. Grades are available within one month of the test date, unless grading is delayed (see below).
Examinee ID	An exam is identified by candidate number and not by name.
Lost Exam	If an exam is lost in shipping or accidentally destroyed during transmission, no grade can be determined. The Institutes will arrange to re-administer the examination.
Exam Grade Notification	When registering, please provide The Institutes with a current email address to ensure prompt grade notification. A notice sent to your preferred email address will inform you that an official grade report is available on The Institutes' website. Be advised that spam filters and firewalls could result in the inability to deliver the grade notification.
Exam Grades	Institutes exams are scored using a letter grade. Grades are final and are not subject to appeal. Numerical scores are not released.
Exam Delays	Grades can be delayed when a course undergoes a change in content or exam format. Results are delayed until an adequate number of administrations allow for statistical analysis of the exam forms. Please be aware of this situation when registering for an exam that is based on new study material or a new exam format. Please note that the grading of all essay exams may be delayed for up to seven weeks. Check The Institutes' website for any grading delays: TheInstitutes.org/guide/current-grading-delays .

International Exam Information

Unless otherwise specified, The Institutes' domestic exam policies and procedures apply to exams given outside the United States, its territories, and possessions.

International Exam Information	
Computer Exam Administration Outside the U.S.	Computer exams, whether administered on-site or at a Prometric Testing Center, follow the same exam procedures and policies as those in the United States. After registering with The Institutes, international examinees are encouraged to use the Internet to schedule a Prometric appointment in order to decrease expenses: Prometric.com/TheInstitutes . Prometric's international telephone numbers are shown below.
Paper and Pen Exams/Exam Fee	If a Prometric or an on-site testing center is not available in an international location, The Institutes will attempt to arrange for exam administration in paper and pen format. The cost is the Prometric early exam registration fee plus an additional \$200 administration fee. Contact Assessments@TheInstitutes.org well in advance of the exam date for further information.
Payment	The Institutes accept American Express, Diners Club, Discover, MasterCard, and VISA. Mailed registrations may also be paid by check or money order. Fees are nonrefundable and nontransferable and must be paid in U.S. currency.
Paper and Pen Cancellation Forfeiture	Failure to sit for a paper and pen examination will result in the loss of the entire amount of both the registration fee.
2020 Paper and Pen Exam Dates	Paper and pen exam administration, when the computer option is not available, is limited to four dates: March 2, June 1, September 7, and December 7.
How to Register	<p>Online: TheInstitutes.org</p> <p>Phone: (800) 644-2101 or 00 + 1 + 610-644-2100 Monday–Friday 8 am to 6 pm ET</p> <p>Fax: 00 +1 + 610-640-9576</p> <p>Mail: 720 Providence Rd., Suite 100, Malvern, PA 19355-3433</p> <p>Registration Form (for mail-in or fax): See pages 16 or 18</p>
Identification	Register for an exam using your name exactly as it appears on the photo ID you will present at the testing center.
Contacting The Institutes	Outside the U.S. and Canada, please call 00 + 1 + 610-644-2100 or email CustomerSuccess@TheInstitutes.org .
Registration Deadline	Registrations for international paper and pen exams will not be accepted after the first day of a testing window in which the exam date falls. Those dates are January 15, April 15, July 15, and October 15, 2020.
Registration Confirmation	Notification of the location and time of a paper and pen exam center address will be mailed approximately three weeks prior to the exam date.

International Prometric Telephone Numbers

Region	Contact Center	Region	Contact Center
North America–U.S. & Canada	1-877-311-2525	Korea	007-9814-2030-248
Latin America & Caribbean	1-443-751-4995	China	86-10-82345674
Europe	31-320-239-540	Hong Kong	60-3-7628-3333
Middle East & North Africa	31-320-239-530	Southeast Asia	60-3-7628-3333
Africa	31-320-239-593	India	91-124-414-7700
Japan	81-3-6204-9830	Australia & New Zealand	603-76283333

Select Exams via Paper and Pen

When computer administration is not available, you can register to take these exams as Select Exams via Paper and Pen.

These exams are offered via paper and pen:

- Essentials of Supervision (SM 18)
- Supervisory Skills (SM 19)
- Delivering Insurance Services (AIS 25)

Select paper and pen exams are administered using test booklets and optical scan answer sheets. Paper versions of the select exams are available year-round and are administered in the workplace under the supervision of a proctor identified by the examinee. The proctor can be a course leader, supervisor, or human resources staff member. Select exams follow many of the procedures and rules applicable to other Institutes exams.

Separate information is presented in this booklet for areas in which select paper and pen exams differ from the other forms of Institutes exams. Instances where select exam information differs include the actual registration form (page 18) and the registration fees.

Acceptance of Institutes Privacy Statement

Similar to all examinees, examinees registering for paper and pen exams are subject to The Institutes Privacy Statement. Enrolling in any Institutes course, registering for an exam or holding an Institutes certification or designation indicates your knowledge and acceptance of The Institutes Privacy Policy. For more details, please visit TheInstitutes.org/privacy.

Registering for a Select Exam Offered via Paper and Pen

Steps in the Registration Process	<ol style="list-style-type: none"> 1. Secure an appropriate person to administer your exam. A course leader, a manager, a supervisor, or another experienced person, such as a training/education coordinator or the education chairperson of an insurance association, are an appropriate choice. Friends, relatives, and nonsupervisory coworkers are not appropriate test administrators. Explain to the person you select as test administrator that The Institutes provide no compensation for test administration, and with that person jointly review the Test Administrator Responsibilities on page 15. As an alternative, consider taking a computer exam at a Prometric Testing Center. The registration fee is lower and exam results usually are available immediately after the conclusion of the testing session. 2. Choose an exam date. Select paper and pen exams can be administered at any time, not just during The Institutes' testing windows 3. Complete the Registration Form on page 18 and 19 in ink. Note that exam fees differ according to the exam and where it is administered. Please contact Customer Success at (800)644-2101 for information about fees. 4. Submit the Registration Form. Give the completed Registration Form and exam fee to your test administrator so it can be mailed to The Institutes at least three weeks before your exam date.
Payment Options	<p>The Institutes accept American Express, Diners Club, Discover, MasterCard, and VISA. Mailed registrations may also be paid by check or money order. Fees are nonrefundable and nontransferable and must be paid in U.S. currency.</p>
Registration Deadline	<p>Other than the requirement to submit the registration three weeks in advance of the exam date, there is no registration deadline or late fee associated with a select exam offered via paper and pen.</p>
Exam Confirmation Notice	<p>The Institutes will ship the examination materials approximately two weeks in advance of your test date. The test administrator will be requested to inform you when the exam materials arrive and to confirm the agreed upon test date.</p>

Students Who Do Not Sit for a Select Paper and Pen Exam

An examinee must sit for a select paper and pen exam no later than three days after the scheduled exam date. Materials should be returned to The Institutes if any further delay is anticipated. Students who do not sit for a select paper and pen exam must register again and pay the full registration fee.

Test Administrator Instructions for Select Paper and Pen Exams

The list of Select Paper and Pen Exams is available on page 14. A student registering for paper and pen exams must provide the following registration and proctoring information to a prospective test administrator.

Test Administrator: The student has enlisted your aid as a test administrator for one of The Institutes Select Exams. Please take the necessary steps to ensure that the registration form can be mailed to The Institutes at least three weeks before the exam date.

Test Administrator Registration Responsibilities

Complete the Registration Forms on page 18	Collect a registration form from each examinee. Forms must be submitted with the appropriate exam fee. Please make a photocopy of the student information side of all registrations.
Sign Item 18 of the Registration Form	Please read, complete, and sign item 18. Be certain that your name and address appear in the shipping information block on the form.
Multiple Registrations	A group of registration forms requires shipping information only on the first form in the batch.
Submit the Registration Forms	At least three weeks before the exam date, send the registration form(s) to The Institutes. Also submit a cover letter that confirms the names on the registration forms. Mail registration(s) for paper and pen exams to: Select Paper Exams The Institutes 720 Providence Road, Suite 100 Malvern, PA 19355-3433.

Test Administration Responsibilities

Receive Exam Materials	Exams will be shipped to you by UPS. If you do not receive the exam shipment one week before the scheduled test date, call The Institutes at (610) 644-2100, ext 7304.
Notify Examinee	Inform the examinee(s) when the examination(s) arrive(s) and reconfirm the test date.
Proctor the Exam	<ul style="list-style-type: none"> • Serve as a test administrator without compensation from The Institutes. • Receive and ensure the safety and integrity of the exam(s) and student answers, and ensure that neither the exam nor any part of it is photocopied or recorded in any way or discussed with anyone. • Arrange for a quiet disruption-free area for administration of the examination. • Administer the exam according to the instructions that accompany it including monitoring the examinees during the entire testing session. • Carefully monitor the exam room during the testing session to ensure test security. • Return the exam(s) to The Institutes immediately after administration.

2020 Computer Registration Form (and Preapproved International Paper and Pen Centers)

To register for an exam, please complete both sides of this form and return it to The Institutes as soon as possible. Either credit card information or the necessary fees (U.S. currency only) must accompany this Registration Form.

Do not use this form to register for AAI segmented examinations offered through state associations—see AAI class sponsor or Select Exams Offered via Paper and Pen listed on page 14.

Telephone: (800) 644-2101 or (610) 644-2100 Fax: (610) 640-9576 Email: CustomerSuccess@TheInstitutes.org Web: TheInstitutes.org

1. Student ID number (if assigned)

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To have a student identification number assigned to you, please call Customer Success at (800) 644-2101.

Cautions about requesting new ID numbers:

- The Request a New ID function is not available to employees of some companies. Check with your employer before requesting a new ID number.
- Changing to a new ID number may delay employer reimbursement or incentive payments. Check with your employer before requesting a new ID number.
- Creating a new ID number may result in exam grades being improperly recorded in your different records. Always check your grades after changing your ID number.

2. PRINT your full name exactly as shown on the photo ID you will present at the testing center. Your name must match, or you will be denied admission to the testing center.

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Last

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First

MI

3. If you have previously registered for an examination under a different name, please print that name.

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First

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4. Date of birth: Day _____ Month _____ Year _____

5. Year entered the insurance business: _____

6. Highest degree earned: (Check one)

- | | |
|---|--|
| <input type="checkbox"/> High school or GED | <input type="checkbox"/> Law |
| <input type="checkbox"/> Associate | <input type="checkbox"/> Doctorate |
| <input type="checkbox"/> Bachelor | <input type="checkbox"/> None of the above |
| <input type="checkbox"/> Master | |

7. Business title: _____

8. Daytime phone number: _____

9. Email address: _____

Check here if you would like to receive email updates

10. Job level: (Check one)

- Executive or Senior Management
- Middle or General Management
- First-Line or Supervisory Management
- Senior Level Professional (non-management)
- Mid-level Professional (non-management)
- Entry Level (non-management)
- Other

11. Principal job function: (Check one)

- Actuarial
- Agent/Broker/Producer
- Analyst
- Claims
- Customer Service
- Finance/Accounting
- HR/Training & Development
- Information Systems/Technology
- Legal/Compliance
- Reinsurance
- Risk Management
- Sales & Marketing
- Underwriting
- Other

12. Employer's name: _____

13. Branch office city/state (if applicable)

City: _____ State: _____

14. Employer organization type: (Check one)

- Insurance company
- Reinsurance company
- Agency
- Adjusting firm
- Brokerage firm
- Third-party administrator (TPA)
- Government/public entity
- Risk management in a noninsurance organization
- Professional/trade/education organization
- Other insurance services: _____
- Other financial services: _____

Print your name: _____

15. Preferred mailing address: Home Business

Address _____

Address _____

City/State/Zip _____

Province/Country _____

16. First-time registrants only—how did you hear about The Institutes? (Check one)

- 1 Employer HR, education, or training department
- 2 Manager or supervisor
- 3 Co-worker or business colleague
- 4 Advertisement in industry publication
- 5 Professional association
- 6 Web search
- 7 Conference or trade show
- 8 Other: _____

17. What diploma/certificate are you working toward? (Check one)

- | | | |
|--------------------------------|-------------------------------|--------------------------------|
| <input type="checkbox"/> CPCU | <input type="checkbox"/> AINS | <input type="checkbox"/> ALSI |
| <input type="checkbox"/> AAI | <input type="checkbox"/> AIS | <input type="checkbox"/> AU |
| <input type="checkbox"/> AAI-M | <input type="checkbox"/> AIT | <input type="checkbox"/> AU-M |
| <input type="checkbox"/> ACSR | <input type="checkbox"/> AMIM | <input type="checkbox"/> PRC |
| <input type="checkbox"/> AFSB | <input type="checkbox"/> ANFI | <input type="checkbox"/> RMI |
| <input type="checkbox"/> AIAF | <input type="checkbox"/> APA | <input type="checkbox"/> SM |
| <input type="checkbox"/> AIC | <input type="checkbox"/> API | <input type="checkbox"/> Cyber |
| <input type="checkbox"/> AIC-M | <input type="checkbox"/> ARC | <input type="checkbox"/> SPPA |
| <input type="checkbox"/> AIDA | <input type="checkbox"/> ARe | <input type="checkbox"/> WCCA |
| <input type="checkbox"/> AIM | <input type="checkbox"/> ARM | <input type="checkbox"/> WCCP |

18. Your exam registration—Indicate initials for the exam and its number (e.g., AIC 40, AIM 40) and the segment, if appropriate (AINS 21 A, ARM 401 B). Then, indicate the testing window.

Exam No.	Testing Window or International Date (e.g., October 15 - December 15, 2020 or December 7, 2020)

19. Preparation method: (Check one)

- 1 Group learning with a course leader
- 2 Group learning without a course leader
- 3 Independent learning
- 4 Relying solely on experience and knowledge
- 5 Relying on non-Institutes study materials
- 6 Institutes Online Learning
- 7 Other Online Classes

Student ID number: _____

20. Exam to be taken at: (Check one)

- Prometric Testing Centers worldwide
- Institutes-Approved On-site testing centers worldwide

On-site Center Code Number: _____

Center must be pre-approved by The Institutes.

- International Paper and Pen Testing Center

City: _____ Country: _____

21. CE Credit (Check applicable license):

- Producer Adjuster None

License/NPN # _____

Resident State _____

License Expiration Date _____

22. The Institutes Privacy Statement

The Institutes respect students' privacy rights and are committed to safeguarding each student's personal information. Please see The Institutes Privacy Statement on The Institutes' website, www.TheInstitutes.org/privacy.

23. Ethics

A CPCU candidate is bound by the CPCU Code of Professional Conduct. CPCUs along with all other persons taking Institutes exams are subject to The Institutes' Code of Academic and Professional Integrity. The CPCU Code is available at www.TheInstitutes.org/doc/canons.pdf

The Code of Professional and Academic Integrity is found at TheInstitutes.org/CAPI.

24. Payment: (See page 11 for Exam Fee Chart)

Exam Fee	\$
International Paper and Pen – Add \$200 Each	\$
Credit Available	-\$
Total Remittance	\$

If paying by check, please make payable to The Institutes.

For corporate invoicing, provide the billable account code.

Account Code: _____

Return this form with fee or payment information to:

The Institutes
720 Providence Road, Suite 100
Malvern, PA 19355-3433
Fax: (610) 640-9576

Credit Card number: _____

(American Express, Diners Club, Discover, MasterCard, and VISA cards are accepted.)

Expiration date: _____

Signature: _____

For accounting use only Date

Received _____

Amount _____ Account # _____

Select Exams Offered via Paper and Pen Only

2020 Registration Form

To register for an exam, please complete both sides of this form and return it to The Institutes as soon as possible. Either credit card information or the necessary fees (U.S. currency only) must accompany this Registration Form.

Do not use this form to register for AAI segmented examinations offered through state associations—see AAI class sponsor or Select Exams Offered via Paper and Pen listed on page 14.

Telephone: (800) 644-2101 or (610) 644-2100 Fax: (610) 640-9576 Email: CustomerSuccess@TheInstitutes.org Web: TheInstitutes.org

1. Student ID number (if assigned)

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To have a student identification number assigned to you, please call Customer Success at (800) 644-2101.

Cautions about requesting new ID numbers:

- The Request a New ID function is not available to employees of some companies. Check with your employer before requesting a new ID number.
- Changing to a new ID number may delay employer reimbursement or incentive payments. Check with your employer before requesting a new ID number.
- Creating a new ID number may result in exam grades being improperly recorded in your different records. Always check your grades after changing your ID number.

2. PRINT your full name exactly as shown on the photo ID you will present at the testing center. Your name must match, or you will be denied admission to the testing center.

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First

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3. If you have previously registered for an examination under a different name, please print that name.

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Last

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First

MI

4. Date of birth: Day _____ Month _____ Year _____

5. Year entered the insurance business: _____

6. Highest degree earned: (Check one)

- | | |
|---|--|
| 1 <input type="checkbox"/> High school or GED | 5 <input type="checkbox"/> Law |
| 2 <input type="checkbox"/> Associate | 6 <input type="checkbox"/> Doctorate |
| 3 <input type="checkbox"/> Bachelor | 7 <input type="checkbox"/> None of the above |
| 4 <input type="checkbox"/> Master | |

7. Business title: _____

8. Daytime phone number: _____

9. Email address: _____

Check here if you would like to receive email updates

10. Job level: (Check one)

- 1 Executive or Senior Management
- 2 Middle or General Management
- 3 First-Line or Supervisory Management
- 4 Senior Level Professional (non-management)
- 5 Mid-level Professional (non-management)
- 6 Entry Level (non-management)
- 7 Other

11. Principal job function: (Check one)

- 1 Actuarial
- 2 Agent/Broker/Producer
- 3 Analyst
- 4 Claims
- 5 Customer Service
- 6 Finance/Accounting
- 7 HR/Training & Development
- 8 Information Systems/Technology
- 9 Legal/Compliance
- 10 Reinsurance
- 11 Risk Management
- 12 Sales & Marketing
- 13 Underwriting
- 14 Other

12. Employer's name: _____

13. Branch office city/state (if applicable) City: _____ State: _____

14. Employer organization type: (Check one)

- 1 Insurance company
- 2 Reinsurance company
- 3 Agency
- 4 Adjusting firm
- 5 Brokerage firm
- 6 Third-party administrator (TPA)
- 7 Government/public entity
- 8 Risk management in a noninsurance organization
- 9 Professional/trade/education organization
- 10 Other insurance services: _____
- 11 Other financial services: _____

Print your name: _____

Student ID number: _____

15. Preferred mailing address: Home Business

Address _____

Address _____

City/State/Zip _____

Province/Country _____

16. First-time registrants only—how did you hear about The Institutes? (Check one)

- 1 Employer HR, education, or training department
- 2 Manager or supervisor
- 3 Co-worker or business colleague
- 4 Advertisement in industry publication
- 5 Professional association
- 6 Web search
- 7 Conference or trade show
- 9 Other: _____

17. Exam registration—Indicate the exam(s) for which you are registering

- 348 Essentials of Supervision (SM 18)
- 349 Supervisory Skills (SM 19)
- 025 Delivering Insurance Services (AIS 25)

18. Select Paper and Pen Test Information

The test administer must complete this section.

a. Exam Location: Domestic International

b. Exam Date: _____ / _____ / _____

I accept the role and responsibilities of an exam administrator and agree to the conditions set forth by The Institutes on page 15 of the examination Registration Booklet.

Name (please print): _____

Signature: _____

Relationship to student: _____

Daytime phone: _____ Ext. _____

Email address: _____

Proctor's street address, to which exam(s) should be sent:
(No PO Box)

Company name: _____

Address: _____

Address: _____

City/State/ZIP: _____

Province/Country: _____

19. Preparation method: (Check one)

- 1 Group learning with a course leader
- 2 Group learning without a course leader
- 3 Independent learning
- 4 Relying solely on experience and knowledge
- 5 Relying on non-Institutes study materials
- 6 Institutes Online Learning
- 7 Other Online Classes

20. CE Credit (Check applicable license):

Producer Adjuster None

License/NPN # _____

Resident State _____

License Expiration Date _____

21. The Institutes Privacy Statement

The Institutes respect students' privacy rights and are committed to safeguarding each student's personal information. Please see The Institutes Privacy Statement on The Institutes' website, www.TheInstitutes.org/guide/copyright.

22. Ethics

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The Code of Professional and Academic Integrity is found at TheInstitutes.org/CAPL.

23. Payment: (See page 11 for Exam Fee Chart)

Exam Fee	\$ _____
Credit Available	-\$ _____
Total Remittance	\$ _____

If paying by check, please make payable to The Institutes.

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For accounting use only Date

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Amount _____ Account # _____