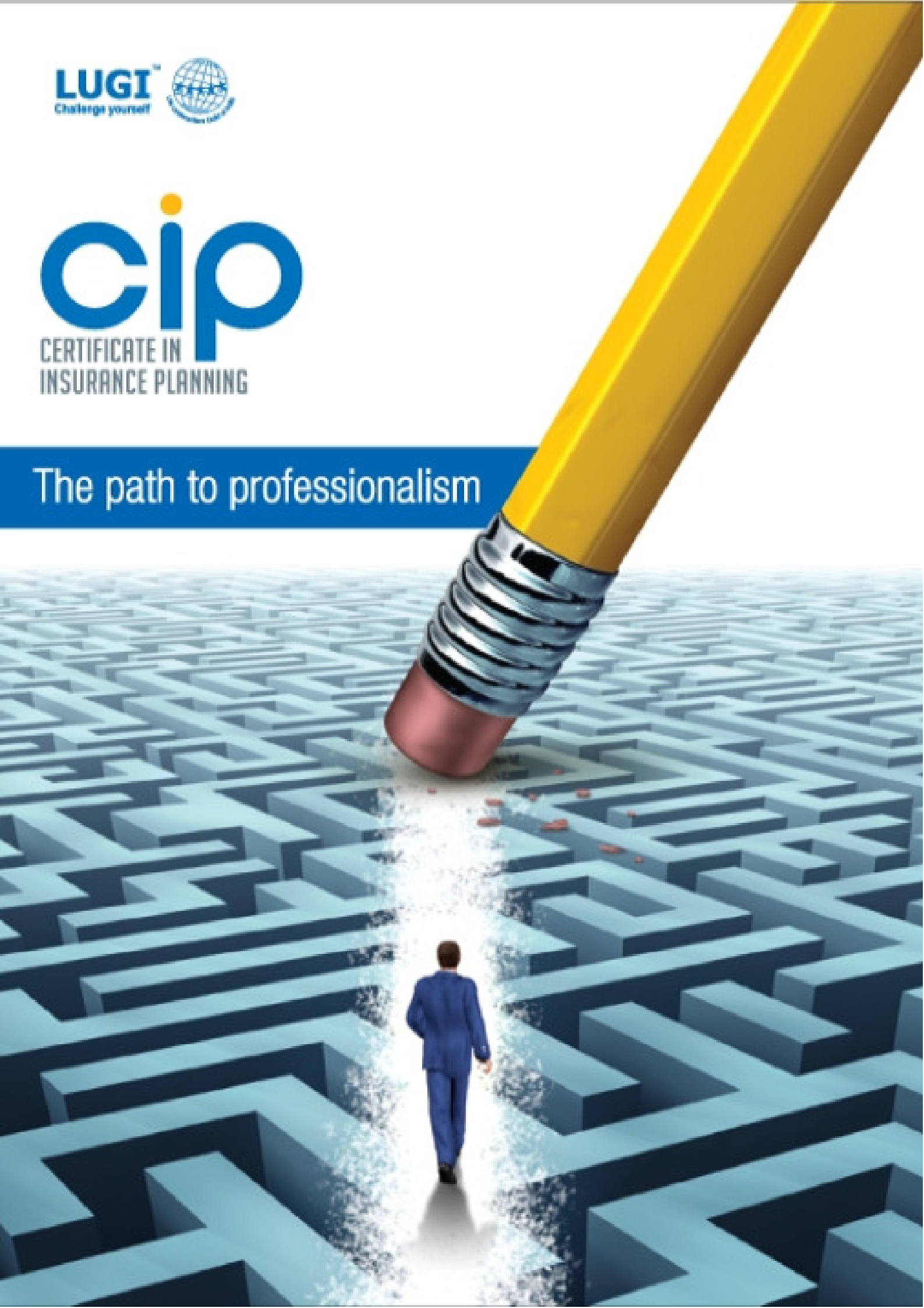




# cip

CERTIFICATE IN  
INSURANCE PLANNING

The path to professionalism



People are turning to professionals who are able to apply knowledge and skills to provide sound advice for their financial well-being. The best way to equip yourself and be seen as a professional is through formal education that moulds you with the balance of training, skill development and practical knowledge.



## LUGI presents CIP (Certificate in Insurance Planning)

Life Underwriters Guild of India has been in the forefront of transforming insurance and financial advisors across India. LUGI has also been accredited by APFinSA to offer FChFP (Fellow Chartered Financial Practitioner) in India and has been successfully conducting the same for several years, building professionals. LUGI, now launches **Certificate in Insurance Planning**, a course created to provide fundamental working knowledge on personal finance, wealth management, risk management and legal aspects of insurance planning.

## Your gateway to professionalism

The Certificate in Insurance planning course is designed to adequately equip you with conceptual and practical understanding of financial and risk planning. Within a short span of meticulously going through the course, you will be able amply appreciate the terminologies, concepts, practical applications of wealth management from a functional perspective. **This programme commences in January 2016.**

## Objective of the COURSE

- Get equipped with the fundamentals of financial planning in order to make informed advice related to spending, saving, borrowing, and investing.
- Get exposed to essential aspects of insurance contracts and the insurance industry at a conceptual level to understand and appreciate business risk management.



# The Curriculum

The course is designed to build knowledge on two primary aspects through a single module of syllabus.

**Personal Finance & Fundamentals of Investments:** Provides comprehensive coverage of personal financial planning in the areas of money management, taxes, consumer credit, housing finance and other consumer decisions, legal protection, insurance, investments, retirement planning, and estate planning.

**Risk Management & Legal Aspects:** Offers the essential aspects of insurance contracts and the insurance industry. Provides a substantially more conceptual analysis and attention to business risk management and public policy issues that exists currently.

The goal is to teach students the fundamentals of financial planning so they can make informed advice related to spending, saving, borrowing, and investing that lead to long-term financial security. The module also uses many financial planning tools with a step-by-step approach to help students identify and evaluate choices as well as understand the consequences of decisions in terms of opportunity costs.

## Who can join?

**Certificate in Insurance Planning is designed for**

- Those who are planning to take insurance selling as career
- For Financial Intermediaries / Insurance Agents, especially those who are at the beginning of their careers
- Students, who wish to make an entry in to the Insurance sector - both in Life & Non-Life.
- Practising Insurance Agents who wish to sharpen their business knowledge and increase their potential earning capacity
- Any individual who is aiming at financial literacy

**Criteria:**

School leaving exam (+2) passed or appearing in the current year. Candidates with work experience may be admitted with exemptions.



## Duration of the course

**Maximum period of 6 months.** A minimum of 60 days / 2 months should have been completed from the first day of the batch announcement or commencement.

**Tutorial\* hours: 15 + 15 = 30 hrs** of Tutorial to support the candidates / students & enriching their knowledge to attempt the certificate course in an exemplary manner. I.e: 30 hrs @ 5 hrs for 6 days. This can spread over as 6 weekends + refresher program.

\*Tutorial is Optional\* and may be organized based on strength and resource availability in specific towns.

## Frequency of the exams:

Every six months.

Two exams a year, during MAY & NOVEMBER of the calendar year will be conducted. The exams will be on the last Saturday of these months\*. Details will be announced at the time of joining the course. \*2016: MAY 28<sup>th</sup> & NOVEMBER 26<sup>th</sup>.

## Mode, Pattern, Duration & Scores of the exam:

**Currently on off line mode.** LUGI has the rights to change the mode as required.

**Examination Pattern:** Multiple Choice Questions pattern. The examination will be for duration of 3 hrs.

The candidate / student can score 100% as maximum. But a minimum of 70% is required to get a pass & to complete the course meritoriously. LUGI has the rights to switch or change the examination pattern as required.

**Attempts for the examination:** The candidate can make a maximum of 3 attempts, (including the first) within 18 months of the commencement of the course. The candidate should pay the Examination fee every time, if he/she happen to re appear again. Failing after 3 attempts, if so, re - registration with a fee, as decided by LUGI for the course is mandatory in addition to Mandatory tutorial class attendance.

**Examination Fee:** An examination fee is involved for every appearance of the examination. LUGI will be announcing the fee at the time of commencements of the course.

## Course Fee

The registration fee & the cost of the course material (including the cost of the Financial Calculator & the book on Time Value of money) will be Rs. 7540/- plus taxes as applicable. Fees to be paid in full at the time of Registration. The payment can be effected to the Bank account of LUGI, details of which is provided in the Registration forms.

## Certification by LUGI

LUGI- Life underwriters Guild of India will be the certifying authority.

The Certificate of Merit will be issued by LUGI to the eligible candidates who have meritoriously completed the course. The certificates will be issued within 30 days from the completion of the course. The certification will be despatched by courier/ speed post or any other authorised mode, as decided by LUGI.

"Invest in yourself,  
in your education.  
There's nothing better."

Sylvia Porter

For more information: Visit [www.lugi.org](http://www.lugi.org) or email us [cip@lugi.org](mailto:cip@lugi.org)



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