

DATE: _____

TO: Insurance Councils of Saskatchewan
310 – 2631 – 28th Avenue
Regina SK S4S 6X3

FROM: _____
APPLICANT NAME

SUBJECT: Application to Become an Accredited Course Provider - \$100

The applicant provides insurance related training opportunities for agents, brokers and adjusters and would like to apply for accredited course provider status. If approved we agree to:

1. Assign credit hours fairly and accurately in accordance with Accredited Course Provider Guidelines as attached.
2. Develop an appropriate certificate or letter of attendance/completion on company letterhead, which includes the following information:
 - a) Attendee name
 - b) Date of course
 - c) Name of Course
 - d) Course facilitator name
 - e) Number of credit hours obtained
3. Provide attendees with a certificate or letter of attendance and/or completion for each course/seminar attended. Course completion documents must be provided to each attendee within thirty working days of course completion.
4. The Certificate of Attendance Form must be signed by an instructor or course provider representative.
5. Maintain a record of attendance for audit verification for a period of no less than three years.
6. Ensure that the certificate(s) of attendance are factual and accurate.
7. Instructors and course providers must not allow a certificate of attendance to be signed or given to a licensee prior to course completion in order to ensure a complete record of attendance can be identified.

Council expects providers to verify the qualifications of individual instructors and to monitor the delivery of course material. A “qualified instructor” means a person who has a demonstrated competency in the subject matter of an approved course. The qualification will include one of the following:

1. A degree or designation from an accredited institution of higher learning with a major in insurance;
2. A professional insurance designation or similar designation from an industry association; or
3. Three or more years of practical experience with the specific subject matter of the course.

Courses/seminars will be offered for the following classes of insurance

- | | | |
|---|--|---|
| <input type="checkbox"/> P&C | <input type="checkbox"/> P&C Adjuster | <input type="checkbox"/> Crop Hail Adjuster |
| <input type="checkbox"/> Life and Accident & Sickness | <input type="checkbox"/> Restricted Travel | |

Delivery Methods

- | | | |
|---|------------------------------------|--|
| <input type="checkbox"/> Distance Education | <input type="checkbox"/> Classroom | <input type="checkbox"/> Web Delivered |
| <input type="checkbox"/> Other _____ | | |

Declaration

The applicant agrees that, if at any time, Council determines the undertaking contained in this agreement or the Accredited Course Provider Guidelines have not been complied with, Council may withdraw accredited course provider status and refuse to accept certificates of credit hours from the applicant.

FULL COMPANY NAME

ADDRESS

WEB SITE ADDRESS

NAME OF CONTINUING EDUCATION LIAISON/CONTACT

SIGNATURE OF LIAISON/CONTACT

TELEPHONE

FAX

E-MAIL ADDRESS

DATED THIS _____ DAY OF _____, _____.
(DAY) (MONTH) (YEAR)

DOCUMENTS PROVIDED TO PROVIDER
Accredited Course Provider Guidelines
Bylaws

General Insurance Council Bylaws

Definition of Continuing Education

- (1) Courses, programs or meetings related to sales production, promotion or motivation do not qualify for credit hours.
- (2) Courses related to computer training do not qualify for credit hours with the following exception:
 - (a) courses relating to brokerage/client management systems may qualify for a combined maximum of 25% of the licensee's annual continuing education requirement where:
 - (i) the brokerage/client management system is being used by the licensee's agency; and
 - (ii) the licensee is learning a new brokerage/client management system, or one that has significantly changed since the licensee originally learned the system.

P&C

Continuing education for a property and casualty licensee must be directly related to property and casualty insurance products or services, or the management of a property and casualty insurance agency.

Restricted Auto

Continuing education for a Restricted Auto licensee must be directly related to automobile insurance products.

P&C Adjuster

Continuing education for an adjuster licensee must be directly related to claims handling of property and casualty insurance products or services, or the management of an adjusting firm.

Restricted Travel

Continuing education for a Restricted Travel licensee must be directly related to travel insurance products or services, or the management of a travel insurance agency.

Crop Hail Adjuster

Continuing education for a Crop Hail Adjuster licensee must be directly related to adjusting crop hail insurance or other crop hazards.

Life Insurance Council Bylaws

Definition of Continuing Education

Life and/or Accident & Sickness

- (1) Only courses that provide technical education are considered to qualify as continuing education including courses that directly relate to:
 - (a) life or accident and sickness insurance products;
 - (b) financial planning provided that a maximum of five hours per year is related to non-insurance sectors such as securities and mutual funds;
 - (c) compliance with insurance legislation and requirements such as LICs' Code of Conduct, the Act, the regulations, these bylaws, privacy legislation, anti-spam legislation and anti-money laundering, and anti-terrorist financing legislation;
 - (d) ethics;
 - (e) errors and omissions insurance; and
 - (f) courses leading to an approved designation such as:
 - (i) Chartered Life Underwriter (CLU);
 - (ii) Certified Financial Planner (CFP);
 - (iii) Registered Financial Planner (RFP);
 - (iv) Certified Health Insurance Specialist (CHS);
 - (v) Certified Employee Benefit Specialist (CEBS);
 - (vi) Personal Financial Planner (PFP);
 - (vii) Certified International Wealth Manager (CIWM);
 - (viii) Elder Planning Counselor (EPC); and
 - (ix) such other designations as are approved by Council.
- (2) To receive credit for the purposes of continuing education, the licensee must successfully complete the course.
- (3) Courses, programs or meetings related to sales promotion, promotion or motivation do not qualify for credit hours.
- (4) Courses related to computer training do not qualify.

Payment information (Please choose a payment option below)

Make cheque or money order payable to the **Insurance Councils of Saskatchewan**. A NSF charge of \$25 will apply for returned cheques.

or

Charge my credit card for the full amount

VISA

MasterCard

_____-_____-_____-_____
Card Number

_____/_____
Expiry Date

CVV

Signature _____

Print name of applicant _____

Licensing Department
Insurance Councils of Saskatchewan
310 – 2631 – 28th Avenue
Regina SK S4S 6X3

Tel: 306.347.0862
Fax: 306.347.0525

www.skcouncil.sk.ca