Insurance Institute of East Africa’s Professional Development training will inspire your staff to achieve success!

Insurance Institute of East Africa’s Professional Development gives you two ways to learn!

You can choose:

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- Open library of courses with Total Access PD

Looking for Print Books.

Some of our online professional development courses are also available in a print book format.
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insurance Professional Development Table of Contents</td>
<td>1</td>
</tr>
<tr>
<td>General</td>
<td>2</td>
</tr>
<tr>
<td>Anti-Money Laundering</td>
<td>3</td>
</tr>
<tr>
<td>Estate Planning</td>
<td>4</td>
</tr>
<tr>
<td>Insurance Ethics</td>
<td>5</td>
</tr>
<tr>
<td>Health Insurance</td>
<td>6</td>
</tr>
<tr>
<td>Investments and Financial Planning</td>
<td>7</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>8</td>
</tr>
<tr>
<td>Property Casualty Basics</td>
<td>9</td>
</tr>
<tr>
<td>Property Casualty</td>
<td>10</td>
</tr>
<tr>
<td>Property Casualty: Commercial Lines</td>
<td>11</td>
</tr>
<tr>
<td>Property Casualty: Personal Lines</td>
<td>12</td>
</tr>
<tr>
<td>Property Casualty: Claims</td>
<td>13</td>
</tr>
<tr>
<td>Retirement Planning</td>
<td>14</td>
</tr>
</tbody>
</table>
Delivering Quality Service (Customer Service for Insurance)

Here is a definitive study of quality customer service in the insurance environment. Students learn to see service from the customers' view. They learn to establish rapport, develop relationships, listen actively, take ownership of problems, speak positively, and help irate customers.

Effective Business Writing for Insurance People

Bookstores are packed with writing courses, but here's one that will teach you to write business letters, memos, faxes, and email using insurance specific examples. Learn how to appraise a business situation and compose an appropriate, clear, and well-written response. A useful grammar review is included.

Insurance Fraud Awareness

Insurance fraud is a costly problem for the insurance industry, policyholders, and the general public. Learn techniques to identify and fight fraud at the time a policy is purchased or when a claim is made. The course describes common insurance fraud indicators associated with specific types of claims, including property, auto, and workers' compensation.

Insurance Packages for Small Businesses

This course provides an overview of package policies for small- to medium-sized businesses and ISO's businessowners policy and eligibility rules. Students learn typical ways in which company-specific businessowners policies differ from the ISO form.

Business Insurance Concepts

This comprehensive course examines the insurance products and concepts that meet business insurance needs. It compares proprietorships, partnerships, and corporations, and then discusses key employee insurance, deferred compensation, split-dollar plans, executive bonus plans, and group insurance. It includes sample advanced sales agreements, plus valuable prospecting tips and sales ideas. The last unit explains financial statements and shows how to use them as sales tools.

Cyber Risk Insurance

This course explains how businesses can manage the risk of being victimized by a cyber crime through effective risk management processes and stringent technology and information security protocols. It also examines the coverage provided for cyber crimes under traditional commercial lines and specialized cyber risk policies.

Risk Management Fundamentals

Who is responsible for developing a risk management plan and what does it consist of? Learn the steps in this process, how it can reduce or eliminate potential losses, and how it benefits insureds, insurance companies, and producers.
### ANTI-MONEY LAUNDERING

#### AML Best Practices for the Life Insurance Industry
This course shows insurance company personnel how to build anti-money laundering programs. It introduces the Bank Security Act, the Money Laundering Control Act, the Money Laundering Suppression Act, and the USA PATRIOT Act. The money laundering process is described, with emphasis on the insurance industry's most vulnerable points. The requirements for a formal program are given, including requirements related to the adoption of policies, procedures, and internal controls. The course explains the compliance officer's specific responsibilities for the program.

#### AML Training Programs for Life Insurance Agents
The course contains the recommended core elements of an AML training program for life insurance agents, as recommended by the American Council of Life Insurers. Major topics addressed in the course include key concepts, agent responsibilities, know your customer, methods of payment, suspicious activity monitoring, record keeping, reporting requirements, and penalties.

#### Anti-Money Laundering Guidelines for Insurers
Get trained on federal anti-money laundering (AML) requirements for insurance companies and their producers. Major topics discussed in this course include the types of insurance companies and products subject to AML requirements, how money launderers operate in the insurance industry, the AML laws and regulations governing insurance companies, and how companies can comply with information gathering and reporting requirements.

#### Anti-Money Laundering Laws and Practices
Where is the insurance industry most vulnerable to money laundering? Learn how to recognize activities that should be considered unusual or suspicious. This course describes the various techniques criminals use to launder money through the financial industry and includes a discussion of the regulations designed to detect, monitor, and prevent these criminal actions. The course covers laws enacted to enhance the government's ability to fight money laundering by monitoring currency transactions and suspicious financial activities.

#### Anti-Money Laundering Programs for Life Insurance Companies
What anti-money laundering programs exist for life insurance companies, and what are the responsibilities of life insurance agents and brokers within those programs? This course is designed to help insurance companies design anti-money laundering programs that effectively address the risks they face from money launderers and terrorists. The course includes an overview of the minimum standards for an anti-money laundering program in life insurance companies, a survey of US laws for combating money laundering and terrorism, the money laundering process, regulations covering money laundering, the development of anti-money laundering programs in insurance companies, suspicious transaction reporting, knowing customers and other guidelines, such as due diligence, red flags associated with suspicious activity involving insurance companies and products, and penalties and responsibilities. The course concludes with seven case studies.

#### Anti-Money Laundering Rules for Insurance Companies
Learn how to comply with anti-money laundering requirements for insurance companies. This course discusses the money laundering problem in the insurance industry, the money laundering process, anti-money laundering laws and regulations for insurance companies, and how companies can comply with anti-money laundering program and reporting requirements.

#### Anti-Money Laundering Standards for the Insurance Industry
This course, Anti-Money Laundering Standards for the Insurance Industry, contains the recommended core elements of an anti-money laundering (AML) program for life insurance companies. Key topics covered in the course include trends in money laundering, major laws addressing money laundering, the core components of an insurance company’s AML program, the role and responsibilities of life insurance agents, record keeping requirements, and reporting requirements and penalties for violating AML laws and regulations.
ESTATE PLANNING

Estate Planning Concepts
Learn what you need to sell life insurance in the profitable estate planning market. This course covers forms of property ownership, wills, trusts, probate, and estate and death taxes. Learn how to use life insurance and annuities to achieve important estate planning objectives.

Problematic Beneficiary Designations
Discover potential problems in beneficiary designations for life insurance, annuities, and retirement plans. Learn the tax consequences of these designations, complications when children are named, the use of trusts to solve problems, and your role in the beneficiary designation process.

Understanding Wills and Intestacy
Is it really important to have a will? Find out why your clients avoid this critical step. What do wills accomplish and what are the consequences of intestacy? Learn the process of drafting and executing a will and gain mastery of the complex language of estate planning.
<table>
<thead>
<tr>
<th><strong>INSURANCE ETHICS</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ethical Insurance Producer</strong></td>
</tr>
<tr>
<td>The greatest asset insurance producers can have is the trust of their clients. Here is an excellent introduction to the insurance producer's ethical responsibilities to insurers, their clients, the public, and the state. The course focuses on the expression of ethical principles in the daily activities of insurance producers.</td>
</tr>
<tr>
<td><strong>Ethical Practices</strong></td>
</tr>
<tr>
<td>Understand insurance company's ethical standards for life agents, managers, and marketing support personnel. This course focuses on serving the client's best interest, needs selling, ongoing service, and information sharing and privacy protection requirements established by the Gramm-Leach-Bliley Financial Modernization Act.</td>
</tr>
<tr>
<td><strong>Ethics</strong></td>
</tr>
<tr>
<td>Ethical requirements that apply to insurance companies and agents are covered in this course that applies to both life and health and property and casualty producers. Learn to recognize the ethical dilemmas you may encounter in your career and get guidance on attitudes and specific conduct that is expected.</td>
</tr>
<tr>
<td><strong>Ethics at Work</strong></td>
</tr>
<tr>
<td>This course emphasizes the importance of ethical conduct and professionalism in the property and casualty industry. Learn how consumer protection and ethical issues relate to insurance regulation, with an emphasis on claims, underwriting, and sales practices. Case studies and exercises help you apply what you've learned.</td>
</tr>
<tr>
<td><strong>Ethics for Property and Casualty Professionals</strong></td>
</tr>
<tr>
<td>Go beyond the generic subject of ethics with real-life scenarios for property and casualty professionals. Learn about the complexities of ethical decision-making in your role as an independent or captive agent, broker, or agency manager. Learn about your responsibilities to the client and selling to meet client needs.</td>
</tr>
<tr>
<td><strong>Ethics for the Insurance Professional</strong></td>
</tr>
<tr>
<td>This course outlines the broad parameters of a life insurance agent's ethical responsibilities. It details the agent's responsibility to the insurer, policy owners and the public and outlines legal and fiduciary issues. Case studies and examples throughout the course reflect common ethical dilemmas agents face.</td>
</tr>
<tr>
<td><strong>Insurance Ethics and Consumer Protection</strong></td>
</tr>
<tr>
<td>As an insurance professional, you will learn why ethical conduct is good business. This course is appropriate for life and health and property and casualty staff and producers</td>
</tr>
<tr>
<td><strong>Suitability for Annuities</strong></td>
</tr>
<tr>
<td>Make appropriate recommendations for prospects and clients using these principles and guidelines for determining the suitability of annuity products. This course looks at the proper use and application of fixed, variable, and equity-indexed annuities; their purpose, function, and the needs they serve.</td>
</tr>
</tbody>
</table>
HEALTH INSURANCE

Selling Disability Income Insurance
This comprehensive course on disability income insurance provides the training that agents need to educate clients and sell disability insurance policies in the individual and business markets. This course defines and explains the major forms of disability income insurance in clear and concise language with illustrations and marketing strategies.

Health Concepts
This course provides a comprehensive look at the health insurance industry. Health insurance products are the subject of this course. Topics include: types of policies, disability income and medical expense insurance, dental insurance. Learn about the industry, marketing, applications, underwriting, group policies, common, required and optional policy provisions, dental insurance among others.

Group Insurance
Group insurance is a different animal. Get practical advice on enrolling, installing, and servicing group plans for life, health, and long-term care insurance. This course includes coverage of tax rules and the impact of managed care and health insurance portability requirements.

Interpreting Medical Reports
This is an excellent introduction to medical terms and human anatomy from a claims perspective. The study provides the skills needed to competently handle medical claims. Illustrations help the learners locate and identify major bones and key body systems. Students learn the implications of bone and soft tissue injuries. Job aids include medical abbreviations, medical terminology, a pronunciation guide, and a temporary disability time estimate chart.

Medical Tests and Signs
Plain-language explanations and illustrations introduce diagnostic tools and relate them to the physical conditions commonly seen in medical claims. This course helps employees understand complex medical reports about tests and signs and use those reports effectively in the claims settlement process.
INVESTMENTS AND FINANCIAL PLANNING

Annuities for Today's Investor
Learn how annuities can satisfy client investment goals. This course discusses the features of annuities and where they belong within the range of retirement saving and distribution options that are available to clients. The course also links annuity features to the sales process.

Annuity Concepts
Learn the fundamentals of individual annuity contracts. This course covers variable annuities in depth, distinguishing them from fixed annuities and discussing variations such as single and periodic premium, immediate and deferred annuities. How annuities are used and tax rules are also covered.

Asset Allocation
Explore the foundational concepts of asset allocation and practical implications of modern portfolio theory. This course also covers rebalancing and the risks that investors may encounter, an extensive history of the capital markets, and a section devoted to suitability and the benefits and disadvantages of wrap accounts.

Financial Planning Process
Get clued into the financial planning process and the financial services industry. This course covers the basic analytic tools of the trade, income tax planning, risk management planning, retirement planning, wealth accumulation planning, estate planning, and business planning, and concludes with a look at the profession.

Equity-Indexed Annuities
Learn the most important concepts relating to equity-indexed annuities (EIAs). This course describes EIA designs, features, and performance in detail. It also shows examples of the way various EIA design structures perform under different market conditions and why indexing is a solid investment strategy for the traditional annuity buyer.

Financial Products Training Course
Give your producers and brokers a practical and sales-oriented look at how each financial product works, including its tax consequences and its relative strengths and weaknesses. This comprehensive course covers deposit accounts, insurance, annuities, securities, mutual funds, and qualified retirement plans. Separate units focus on the risk-return tradeoff and selecting the right investment.

Indexed Products
The growth in popularity of indexed insurance products, specifically fixed indexed annuities and fixed indexed life insurance policies, has been dramatic. While these products are considered fixed contracts, the interest that is credited to these products is based on the performance of an external financial index. The basic concepts of these products may seem simple, but they are among the most complex of all insurance products. To many, they fall in the middle of the risk spectrum, between traditional fixed annuities and life insurance policies and variable annuities and variable life insurance policies.

This course will explain how these products compare and contrast with their fixed counterparts. The course will also cover in detail different interest crediting methods and design characteristics of the indexed product, and the important suitability and market conduct issues related to these products.

Variable Contracts
Take your knowledge of variable contracts to the next level. Learn to describe the formal characteristics of fixed premium variable life, variable universal life, and variable annuities to prospects and clients; determine suitability requirements of variable contracts; and explain and recommend asset allocation based on your clients' needs.
LIFE INSURANCE

Introduction to Advanced Markets
When producers are ready to move into the advanced markets, this course teaches the concepts they must know to succeed. It explains how to prospect for and get the attention of business owners. The course presents the issues that are important to business owners and discusses how producers can meet their needs. It covers succession planning (buy-sell agreements, Section 303 redemptions, and key-employee insurance), as well as several insurance products for advanced markets (group insurance, executive bonus, split-dollar plans, qualified retirement plans, and more). Discover how to collect the information necessary to develop an effective sales proposal.

Introduction to Life Insurance
This is a valuable, first-step training course that explains the job of selling life insurance and what is expected from new agents. It includes tips for a successful career, techniques for identifying insurance markets and analyzing financial needs, finding and contacting prospects, planning presentations, completing the sale, uses for life insurance products, analyzing life insurance policies, and developing professional work habits.

Life Insurance in Action
The primary purpose of life insurance is to provide a benefit in the event of death. This course provides an understanding of the ways in which life insurance provides financial stability during life and protection against financial hardship at death.

Life Insurance Policy Comparison and Underwriting
Take an introductory look at the nature and uses of life insurance, insurance applications and receipts, mortality and rating, underwriting processes and actions, term life insurance, whole life products, specialized policy forms, flexible policies, policy riders, options, provisions, and the use of life insurance for financial planning.

Needs Analysis
This course addresses the basics of needs-based consultative selling. After comparing financial objectives with existing resources, the need for additional insurance becomes obvious to prospects. This course is designed for producers who have just completed their introductory training or for experienced agents who wish to upgrade their skills from package or product selling.
<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Green Insurance Coverage Options</td>
<td>This course explains how the trend toward environmentally friendly products and services impacts the insurance industry in the areas of sales, underwriting, risk management, and claim handling. Insurance professionals who complete this course can use this knowledge to better serve their customers.</td>
</tr>
<tr>
<td>Legal Concepts and Doctrines</td>
<td>What concepts of legal responsibility underlie our system of insurance? This course covers our system of courts and the laws they administer, including contract and tort law, intentional torts, negligence, and strict liability, and how these principles of law affect the investigation, evaluation, and disposition of an insurance claim.</td>
</tr>
<tr>
<td>Property-Casualty Concepts</td>
<td>Get a comprehensive look at key insurance lines, including property, liability, dwelling, homeowners, personal auto, commercial property, ocean and inland marine, commercial general liability, commercial auto, commercial crime, and workers’ compensation. Learn the coverages, exclusions, and conditions of each line. Regulation and company organization are covered.</td>
</tr>
<tr>
<td>Property and Casualty Principles</td>
<td>Do your employees need a quick orientation to the property and casualty industry? This powerful training is designed for completion in the first week on the job. It teaches new employees how the insurance industry operates and the contribution insurance makes to our world. Confidence is increased, and employees are prepared for the new roles they are about to play.</td>
</tr>
<tr>
<td>Reinsurance Fundamentals</td>
<td>This course teaches the elements of reinsurance contracts and discusses the broad categories within facultative and treaty reinsurance: pro rata and excess of loss. It is designed as an orientation course for reinsurance employees or as ongoing education for underwriters and other insurance professionals.</td>
</tr>
<tr>
<td>Underwriting Basics</td>
<td>Students learn the proven-effective, four-step underwriting process: acquire needed information from the right sources, evaluate that information, select and implement sound underwriting actions, and monitor for changes and results. The course covers the basics required to underwrite specific lines of insurance and describes the purpose of reinsurance in the context of the underwriter’s role.</td>
</tr>
<tr>
<td>Underwriting Practices</td>
<td>Underwriting Practices goes beyond the basic techniques and principles of underwriting and focuses on the &quot;how and why&quot; of underwriting: how insurers develop their underwriting and risk selection guidelines, the factors that affect insurance pricing, how insurance rates are developed, and why retrospective rating plans may be appropriate for certain risks.</td>
</tr>
</tbody>
</table>
PROPERTY CASUALTY

Business Income Coverages
This comprehensive training course explains the concepts and terminology of ISO's business income and extra expense forms and frequently used endorsements. Learners discover how to differentiate time element needs from property coverage needs and which factors are used to establish adequate insurance limits to cover loss exposures.

Commercial Auto Coverage
Here is a careful analysis of ISO's business auto, auto dealers, and motor carrier forms. Students learn the eligibility rules and how to use the numerical system for designating the autos covered by each form.

Commercial General Liability Rating
Students classify and rate the occurrence form and learn how claims-made rating is different. Course topics include an introduction to general liability, tools used for rating CGL insurance, classifying and rating the occurrence and claims-made forms, and CGL and the CPP.

Dwelling Coverage
Look no further for complete training on the three Insurance Services Office (ISO) dwelling coverage forms and important endorsements. The course describes who is eligible for dwelling insurance and when it is most commonly used.

Umbrella Liability Coverage
This course delivers an overview of the major coverages, exclusions, and conditions typically included in personal and commercial umbrella policies. Students analyze their company's umbrella policy using a policy analysis manual.

Underwriting Fundamentals
Students learn the proven-effective, four-step underwriting process: acquire needed information from the right sources, evaluate that information, select and implement sound underwriting actions, and monitor for changes and results. The course covers the basics required to underwrite specific lines of insurance and describes the purpose of reinsurance in the context of the underwriter's role.
PROPERTY CASUALTY: COMMERCIAL LINES

Commercial Auto Rating

This comprehensive course teaches how to rate both business auto and garage forms. It covers rating hired commercial auto, employers non-ownership liability, commercial auto truck types, commercial auto trailers, zone risks, and private passenger types. Commercial auto garage rating, tools used for rating commercial auto, and coding procedures are also discussed.

Commercial Crime Coverage

Commercial Crime Coverage analyzes each of the insuring agreements in ISO’s crime coverage program. This course explains how to assemble a commercial crime contract as a monoline policy or as part of the CPP, and it gives an overview of how the exposures are rated.

Commercial General Liability Coverage

Students classify and rate the occurrence form and learn how claims-made rating is different. Course topics include an introduction to general liability, tools used for rating CGL insurance, classifying and rating the occurrence and claims-made forms, and CGL and the CPP.

Commercial Property Coverage

Insurance for buildings and business personal property are discussed in this commercial property coverage course. It teaches the purposes of and coverages provided by commonly used ISO forms, including building and personal property, condominium, and business income forms. It also discusses the causes of loss forms and frequently used endorsements.

Commercial Property Rating

Learn how to rate building and personal property coverages, as well as other commercial property coverages and endorsements. Topics include a review of commercial property insurance, tools used for rating commercial property insurance, class rating, and specific rating.

Product Liability Insurance

What is the product liability risk and what are the types of claims that businesses may face from this exposure? Learn about the development of product liability law and the legal basis for lawsuits. Identify a business’s product liability exposures and the appropriate insurance solution for that risk.

Workers Compensation Coverage

The course presents a careful analysis of the National Council on Compensation Insurance’s workers’ compensation and employers liability policy and the principal features of current issues on workers’ compensation. It discusses benefit structures and basic features of state workers’ compensation laws.

Workers Compensation Rating

This course shows students how to rate the workers’ compensation (WC) and employers liability policy and how to use the WC classification system. It provides an overview of WC benefits, describes loss costs and how they are used, and explains how risks are classified. Exercises on rating from sample applications are included.
PROPERTY CASUALTY: PERSONAL LINES

Homeowners Liability Coverage

This course discusses the coverages, exclusions, and conditions that apply to the Section II Liability coverages in the 2011 version of the ISO homeowners form.

Personal Auto Coverage

Learners will analyze each provision of ISO’s personal auto policy and important policy endorsements. They will also learn about no-fault insurance and the main factors in determining personal auto premiums.

Personal Auto Rating

This course teaches students how to rate the coverages in the personal auto policy. Students use a sample rating manual to rate simple and complex applications.

Personal Lines Endorsements

Insurance professionals often recommend endorsements to customize coverages for their clients. The course explains how to use common endorsements to cover home businesses, personal property, loss settlements, miscellaneous vehicles, other auto insureds, and much more.
**PROPERTY CASUALTY: CLAIMS**

**Auto Physical Damage Fundamentals**

Learn the terms and functions relating to each part and system of an automobile. More than 200 detailed illustrations identify car parts and their locations. Claim representatives who complete Auto Physical Damage Basics before attending training school will be ready to learn the specifics of estimating losses without having to struggle with the terminology. A glossary, index, and table of common abbreviations provide a valuable desk reference when study is complete.

**Claim Fundamentals**

Here is a targeted orientation course for new claim professionals. Learners discover the role of the claim professional and the skills and resources involved in claim handling. Students receive an introduction to the common procedures involved in the claim-handling process and the important ethical issues associated with claims.

**Claim Evaluation and Settlement**

This fundamental course presents the methods used to determine the correct amount to pay for property and liability claims. Students learn the complete settlement process, from reserving to recovery through subrogation or salvage. Practical examples and exercises teach important strategies for on-the-job use.

**Claim Statements**

Here is a practical way to teach the basics of taking statements and to provide practice in interviewing, analysis, evaluation, and decision-making skills. Sample dialogues relate the concepts directly to claim professionals’ daily activities.

**Claim Investigation**

This course presents the basic procedures and relevant laws for property and casualty claim investigations. Students learn specific steps to follow when investigating auto liability, workers' compensation, fire, and fall-down claims. Relevant case studies show how to use information from a loss report in the investigation procedure.

**Liability Insurance Practices**

Determine coverage and legal liability for third-party claims, including those covered under homeowners policies and commercial general liability (CGL) coverage. Claim investigation, damages evaluation, and settlement practices are explained. Particular attention is paid to specific claim issues involving the most common types of liability claims: auto liability and premises liability.

**Claim Negotiation Skills**

This course guides students through the process of claim negotiation. Students focus on preparing for negotiation, establishing the right climate, and other techniques needed to reach quality settlements.
Advance Planning for Senior Needs
Understand the unique needs of retired individuals, the resources available to meet those needs, and planning techniques available to clients at various stages of life. This course considers life insurance, annuities, health insurance, and long-term care, and covers critical market conduct issues.

Determining Retirement Income Needs
What happens when the owner of a tax-qualified retirement account reaches age 70-1/2? This course covers IRS rules governing minimum distributions that must be made together with the tax treatment of these distributions. how these rules affect distributions to beneficiaries after the account owner’s death are also covered.

Investing Retirement Assets
Numerous factors must be taken into account to formulate suitable strategies for investing retirement assets for today’s retirees. This course provides an introduction to distributions from tax qualified retirement plans, as well as an overview of principles of asset allocation that may be appropriate for a retired or retiring client.

Retirement Income Strategies
Retirees need to stretch their assets for 20-30 years or more. Savvy distribution planning can help. Learn when to tap different asset categories and how taxable funds differ from tax-free and tax deferred funds. Manage your clients risk so they won’t outlive their resources.

Principles of Retirement Planning
This course familiarizes agents with the retirement planning market and the retirement planning process by covering three main areas: analyzing and identifying retirement income needs and how to address those needs, health care and health insurance options, and estate and distribution planning. Topics include needs analysis, Social Security, life insurance and annuities, investment products, qualified plans and IRAs, plans for small business owners, long-term care, and wealth distribution.

Financial Challenges Facing Retirees
Key challenges to the financial security of retirees resources, and strategies for distributing retirement savings to provide income for a lifetime are tackled in this course. Learn the need for post-retirement planning, risk management strategies for addressing illness and injury, long-term care, uninsured death, and outliving one’s income.

Understanding Wills and Intestacy
Learners will be able to understand the differences between wills and intestacy and explain the impact of each on an individual's estate and the estate settlement process. This course also covers the laws of intestacy, the intestacy process, and the reason some people die intestate, as well as the general requirements of a valid will, the different types of wills, and the process of drafting and executing a will. It includes sample documents and exercises to help the student gain mastery of the complex language of estate planning.
Start your success story

The Insurance Institute of East Africa’s mission is to help you achieve your professional and career goals, work smarter and perform better. Study anywhere, anytime and take advantage of our excellent professional skills courses.

Enroll today!

Mode of Study | Distance Learning (Online)

Contact Us

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