



Scholarship Information for Individuals

Eligibility, deadlines and more

To find, foster, and retain talent for its member agencies, Insurance Agents & Brokers (IA&B) awards multiple scholarship opportunities throughout the year. IA&B provides about \$10,000 in scholarships each year to individuals and member agencies to attend IA&B education courses.

Available Scholarships for Individuals

Whether you are thinking about entering the field of insurance or you've been in the business for several years, we have scholarship opportunities for everyone. IA&B supports all individuals as they grow and develop throughout their insurance career.

1. Property & Casualty Licensing Study Course

Looking to become a licensed property and casualty insurance agent? Apply for the Licensing Study Course Scholarship to receive financial support on your first step to becoming an agent. IA&B takes the stress out of studying for the licensing exam.

Value of Each Scholarship: Up to \$399

Available: Several scholarships will be awarded to individuals throughout the year.

Completion Note: Recipients have 1 year to complete from time awarded.

Eligibility: Desire to be a successful insurance agent; cannot currently hold any type of insurance license. Does not need to be employed by an agency.

State: PA - In-Person Courses (if available) and Online Webinars/ MD, DE - Self-Study Only

To Apply: Complete IA&B Individual Scholarship Application. Submit application and letter of recommendation from an independent, property & casualty licensed agent to IA&B.

Apply by: Ongoing - apply anytime.

2. Certified Insurance Counselor (CIC) Program

In memory of CIC Education Consultant James T. Harrison, Jr.

Receive a scholarship to earn a CIC Designation. The CIC Program, developed by The National Alliance for Insurance Education and Research, marks and demonstrates commitment to professional excellence and leadership in the insurance industry. It allows insurance professionals to dig deeper into insurance exposures, exclusions, and coverages. To earn a CIC designation, an individual must choose and complete five of seven courses (listed below) and pass the corresponding exams:

- Agency Management
- Commercial Casualty
- Commercial Multiline
- Commercial Property
- Insurance Company Operations
- Life & Health
- Personal Lines

Value of Scholarship: Up to \$2,250

Available: One Full Designation Scholarship - 5 Courses (In-Person Courses or Live Webinars)

Completion Note: Recipient has 3 years to complete designation from time awarded.

Eligibility: Must be a licensed agent; must have at least 3 years of experience in the insurance field. Must work for an IA&B member agency.

State: Available in PA, MD, and DE

To Apply: Complete IA&B Individual Scholarship Application. Submit application and letter of recommendation from supervisor or owner to IA&B. IF the supervisor or owner is not a CIC Designee, send an additional recommendation letter from a CIC Designee.

Apply by: COB on Aug. 31, 2023; Recipients announced Sept. 15, 2023



In memory of CIC Education Consultant James T. Harrison, Jr.

Jim Harrison was a CIC Education Consultant and IA&B instructor for more than 20 years. Anyone who heard Jim speak or took one of his CIC exams can attest to his commitment to quality. Jim believed that education should challenge you; otherwise, what's the point?

In memory of our dear friend, we offer this annual, full CIC scholarship to challenge you to take the next step in your insurance career.

3. Certified Insurance Service Representative (CISR) Program

Receive a scholarship to earn the CISR Designation. The CISR Program, developed by The National Alliance for Insurance Education and Research, empowers outstanding individuals to provide exceptional account management and customer service. CISR courses are known for preparing front-line professionals to analyze risks, policies, forms, and claims data and communicate that understanding clearly to their clients, carriers, and colleagues. To earn a CISR designation, an individual must choose and complete five of nine (listed below) seminars and corresponding exams:

- Agency Operations
- Commercial Casualty I
- Commercial Casualty II
- Commercial Property
- Elements of Risk Management
- Life and Health Essentials
- Miscellaneous Personal Lines
- Personal Auto Exposures
- Personal Residential Property

Value of Scholarship: Up to \$1,025

Available: One Full Designation Scholarship - 5 Courses (In-Person Courses or Live Webinars)

Completion Note: Recipient has 2 years to complete designation from time awarded.

Eligibility: Must be a licensed agent. Must work for an IA&B member agency.

State: Available in PA, MD, and DE

To Apply: Complete IA&B Individual Scholarship Application. Submit application and letter of recommendation from supervisor or owner to IA&B.

Apply by: COB on Aug. 31, 2023; Recipients announced Sept. 15, 2023



Individual Scholarship Application

I am applying for the following scholarship (please check one):

- ☐ Property & Casualty Licensing Study Course (LSC) — PA - In-Person or Live Webinar/MD & DE - Self Study only
- ☐ CIC Designation — 5 Courses
- ☐ CISR Designation — 5 Courses

- If you are applying for the CIC or CISR Designation, your agency must be an IA&B Member. If you are unsure, please ask your manager or owner. You can also contact Sarah Haas at 800-998-9644, ext.104 or SarahJ@IABforME.com.
- Please read *Scholarship Information for Individuals* for eligibility and other guidelines.

Deadlines:

- Licensing Exam Prep: Ongoing, apply anytime
- CIC Designation & CISR Designation: Aug. 31, 2023; Recipients announced Sept. 15, 2023

All applicants must complete this section:

Date _____

Name _____

Address _____ Address Type: Home ☐ Work ☐

City _____ State _____ Zip Code _____

Phone (_____) _____ - _____ Phone Type: Cell ☐ Work ☐ Home ☐

Email _____ Email Type: Home ☐ Work ☐

Years in Insurance Business _____ How did you hear about the IA&B scholarships? _____

Provide 3 examples of volunteering or community involvement:

| | | |
|--------------------|----------------|------------|
| Organization _____ | Activity _____ | Date _____ |
| Organization _____ | Activity _____ | Date _____ |
| Organization _____ | Activity _____ | Date _____ |

How did you hear about the IA&B scholarships? _____

Education

| | |
|--|---|
| High School: | |
| Name of High School | Received: Diploma <input type="checkbox"/> Other <input type="checkbox"/> |
| Trade, College, or Professional School: | |
| Name of School | City, State |
| Did You Graduate? Yes <input type="checkbox"/> No <input type="checkbox"/> | Degree Earned |
| Name of School | City, State |
| Did You Graduate? Yes <input type="checkbox"/> No <input type="checkbox"/> | Degree Earned |
| Name of School | City, State |
| Did You Graduate? Yes <input type="checkbox"/> No <input type="checkbox"/> | Degree Earned |

Contact Information of your Independent Insurance Agency:

- ☐ I'm applying for CISR or CIC Designations and my agency is an IA&B Member.
- ☐ I'm applying for LSC and I do not work for an agency - LSC applicants do not need to work for an agency.

Name of Agency _____

Agency Address _____

City _____ State _____ Zip Code _____

Phone (_____) _____ - _____

Where will you be in your career in 5 years? (50-75 words)

Are you involved with any Insurance Related Organizations? ☐ No ☐ Yes If so, which ones?

Provide two professional references (do not include relatives):

| | |
|-----------------------|--------------|
| Name | Relationship |
| Phone () - | Email |
| Name | Relationship |
| Phone () - | Email |

If you are applying for a Licensing Study Course Scholarship, please complete this section:

Employment

| | |
|---|------------|
| Position | Company |
| Dates of Employment to | Supervisor |
| Three (3) Main Responsibilities: 1.) _____ 2.) _____ 3.) _____ | |

| | |
|---|------------|
| Position | Company |
| Dates of Employment to | Supervisor |
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| | |
|---|------------|
| Position | Company |
| Dates of Employment to | Supervisor |
| Three (3) Main Responsibilities: 1.) _____ 2.) _____ 3.) _____ | |

Why are you looking to become licensed? (50-75 words)

☐ Include or send a letter of recommendation from an independent, property & casualty licensed insurance agent.

If you are applying for a CIC Designation Scholarship, please complete this section:

Why do you want to earn the CIC designation? (75 words or less)

How will earning the CIC designation help you reach these goals? (75 words or less)

List Areas of Focused Education (ex - designations, topics):

- ☐ Include or send letter of recommendation from supervisor or owner.
☐ If owner/supervisor is not a CIC Designee, please include an additional letter of recommendation from a CIC Designee.

If you are applying for a CISR Designation Scholarship, please complete this question:

Why do you want to earn the CISR designation? (50 words or less)

- ☐ Include or send letter of recommendation from supervisor or owner.

Send Application & Letter of Recommendation:

To Sarah Haas at

- Email: SarahJ@IABforME.com
- Mail: IA&B, c/o Sarah Haas, Scholarship Application, 650 Wilson Lane, Suite 200, Mechanicsburg, PA 17055

Other Notes:

- Recipients can select the IA&B course that fits their schedule.
- IA&B does not cover the cost of any travel related expenses or hotel.
- Except as provided herein, scholarships have no monetary value.
- Please read *Scholarship Information for Individuals* for eligibility and other guidelines.

Questions?

Contact
Sarah Haas
800-998-9644, ext. 104
SarahJ@IABforME.com

