

# FOUNDATION FOR THE ADVANCEMENT OF INSURANCE PROFESSIONALS

GEORGE W. HAENSZEL SCHOLARSHIP

APPLICATION FORM

*(Please print clearly or type)*

## Required Materials:

1. Completed application form
2. Letter explaining:
   1. How the scholarship funds will be used to help you be a future/better leader in the independent agency system or a future/better agency owner or partner.
   2. What changes you would like to see in the agency in the next 5 years.
3. Nomination letter from the agency principal

Please submit application and required material to [shawna@ohioinsuranceagents.com](mailto:shawna@ohioinsuranceagents.com)

Use this column to answer questions on the left.

Add sheets as needed.

|  |  |
| --- | --- |
| Date |  |
| First, Middle Initial, Last Name |  |
| Agency Name and address |  |
| Telephone (include Area Code) |  |
| Email Address |  |
| Is your agency a member of OIA? |  |
| Agency size defined by premium volume?  Small: up to $5M; Midsize: $5 to $10M; Large: over $10M |  |
| Are you employed full time in the agency? |  |
| Hire Date |  |
| Position in Agency |  |
| Degree and/or Current Designations |  |
| Are you currently an independent insurance agency owner or partner? (YES / NO)  IF YES, what year did you become an agency owner or partner? |  |
| Do you anticipate becoming an Agency Owner or Partner in the future? (YES / NO)  IF YES, in 1-3 years? 4-5 years? Or over 5 years or unknown? |  |
| Date of Birth |  |

|  |  |
| --- | --- |
| What Agency Management System does your agency use? |  |
| How many full-time employees work in the agency? |  |
| Amount requested? (maximum is $2,500) |  |
| What do you plan to do with the funds if you are awarded the scholarship? |  |

## Check what you are applying for: (Click on product to learn more)

|  |  |
| --- | --- |
| □ OIA’s valuation, perpetuation and insights tools and coaching programs to gain insight and understanding of your agency's value and operations. | [Perpetuation Planning Development and Coaching](https://www.ohioinsuranceagents.com/agent/resources-products/valuation-perpetuation-insights/business-consulting-services) Program (varies based on need)  [R.I.S.E. Report](https://www.ohioinsuranceagents.com/agent/resources-products/valuation-perpetuation-insights/agency-insights) [Valuation Report](https://www.ohioinsuranceagents.com/agent/resources-products/valuation-perpetuation-insights/perpetuation)  [Online Tools](https://www.ohioinsuranceagents.com/agent/resources-products/valuation-perpetuation-insights/agency-insights): Opinion of Value and Agency Insights  [Agency Insights Report](https://www.ohioinsuranceagents.com/agent/resources-products/valuation-perpetuation-insights/agency-insights)  OIA Peer Exchange Program |
| □ Insurance Industry Professional and Leadership Development Programs | [Certified Insurance Counselor Program](https://ohioinsuranceagents.com/trainings/) [OIA Events](https://ohioinsuranceagents.com/upcoming-events/): Next Gen Summit, IACON  [Big I Events: Legislative Conference, Young](https://www.independentagent.com/Events/Pages/Calendars/default.aspx) Agents Leadership Institute, Level Up Agent Summit, Agency Council on Techology  [Agency Nation Elevate Conference](https://www.elevateconference.com/) Other (specify) |