

# 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? (List only one item. Additional requests can be made later.) |  |

## Check below what you are applying for.

## (Click on product to learn more)

|  |  |  |  |
| --- | --- | --- | --- |
| **CHECK HERE** | **ORGANIZATION** | **AGENCY OPERATIONS EDUCATION** | **INVESTMENT** |
|  | OIA | [Valuation](https://www.ohioinsuranceagents.com/agent/resources-products/valuation-perpetuation-insights/perpetuation) | $2,500/initial valuation  $1,200/repeat valuation |
|  | OIA | [Perpetuation Resources](https://www.ohioinsuranceagents.com/agent/resources-products/valuation-perpetuation-insights/business-consulting-services)  Typical Average of Agency Perpetuation Planning  (excluding the cost of Agency Valuation) | $1,500 |
|  | OIA | [Agency Link](https://ohioinsuranceagents.com/product-services/agency-link/) | Price Varies |
|  |  |  |  |
| **CHECK HERE** | **ORGANIZATION** | **PROFESSIONAL DEVELOPMENT** | **INVESTMENT** |
|  | OIA and The National Alliance | [CIC Designation - Certified Insurance Counselor](https://ohioinsuranceagents.com/coronavirus-covid-19/professional-development/)  (5 classes for minimum investment of $2,100) | $420 per class |
|  | OIA and The National Alliance | [CISR Designation - Certified Insurance Service Representative](https://ohioinsuranceagents.com/coronavirus-covid-19/professional-development/)  (5 classes for minimum investment of $805) | $161 per class |
|  | OIA and Beyond Insurance | [Trusted Risk Advisor Certification](https://ohioinsuranceagents.com/trusted-risk-advisor/)  (4 classes for minimum investment of $1,400) | $350 per class |
|  | OIA and The National Alliance | [CPIA Designation - Certified Professional Insurance Agent](https://ohioinsuranceagents.com/coronavirus-covid-19/professional-development/)  (3 classes for minimum investment of $600) | $159 to $199 per class |
|  | The National Alliance | [CRM - Certified Risk Manager](https://www.scic.com/crm/)  (5 classes for minimum investment of $2,200) | $440 per class |
|  | International Risk Management Institute, Inc. | [AFIS Certification - Agribusiness and Farm Insurance Specialist](https://www.irmi.com/certifications/agribusiness-farm-insurance-specialist)  (5 classes for minimum investment of $645) | $129 per class |
|  | The Institutes | [AAI Designation - Accredited Advisor In Insurance, The Institutes](https://web.theinstitutes.org/designations/accredited-adviser-insurance)  3 courses + Ethics  Total Requirements: 4  Average Completion Time:  9-15 Months | Up to $870 per class  Materials:  $85 to $485  Exam:  $110 to $385 |
|  |  |  |  |
| **CHECK HERE** | **ORGANIZATION** | **EVENT** | **INVESTMENT** |
|  | OIA | [Next Gen Summit](https://ohioinsuranceagents.com/product-services/next-gen/) | Registration |
|  | OIA | [IACON](https://ohioinsuranceagents.com/upcoming-events/iacon22registration/) | Registration |
|  | OIA | [Advocacy Day](https://ohioinsuranceagents.com/news/2021/oia-leaders-take-the-ia-message-to-the-statehouse/) | Hotel |
|  | Big I | [Big I Legislative Conference](https://www.independentagent.com/Events) | Registration and Hotel |
|  | Big I | [Big I Fall Leadership Conference / Young Agents Leadership Institute](https://www.independentagent.com/Events) | Registration and Hotel |
|  | Big I | [Agents Council on Technology Meetings](https://www.independentagent.com/Events/Pages/AgentsCouncilForTechnology/default.aspx) | Registration and Hotel |
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Important Notes:

* A scholarship will only be granted if there is an education component.
* Successfully passing the course is required for reimbursement.
* Reimbursement for a class will not be granted for any classes taken prior to the scholarship approval date.
* Scholarships for designations will be awarded for one class at a time. The applicant can reapply using the same application for subsequent classes.
* The scholarship must be used for the agent it was awarded to.
* The scholarship awarded may be less than the amount requested.