



FOUNDATION FOR THE ADVANCEMENT OF INSURANCE PROFESSIONALS
GEORGE W. HAENSZEL SCHOLARSHIP

APPLICATION FORM

(Please print clearly or type)

Required Materials:

1. Completed application.
2. Letter from applicant explaining:
 - a. 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.
 - b. What changes you would like to see in the agency in the next 5 years.
3. Nomination letter from the Agency Principal.

Scholarship funds are intended to supplement or provide financial support to Next Gen independent insurance agents who do not receive funds from their employer for professional development and insurance designations.

Please submit application and required materials to katherine@ohioinsuranceagents.com

Your application is not complete until we receive items #1, 2 and 3 (as applicable).

Use this column to answer questions on the left.
 Add sheets as needed.

Date	
First Name, 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?	
Does your employer provide financial support to employees for insurance industry professional development, designations and/or attendance at industry conferences?	
If so, what is the maximum benefit amount?	
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.)	
Amount requested? (maximum is \$2,500)	

**How will you use the scholarship funds if awarded?
Check below what you are applying for. (Click on product to learn more)**

CHECK HERE	ORGANIZATION	AGENCY OPERATIONS EDUCATION	INVESTMENT
	OIA	Valuation (Future service only)	\$2,500/initial valuation \$1,500/repeat valuation
	OIA	Business Education Services (Future service only)	Price Varies
	OIA	Agency Link (Future service only)	Price Varies
CHECK HERE	ORGANIZATION	PROFESSIONAL DEVELOPMENT	INVESTMENT
	OIA and The National Alliance	CIC Designation (5 classes for minimum investment of \$2,100)	\$420 per class
	OIA and The National Alliance	CISR Designation (5 classes for minimum investment of \$900)	\$180 per class
	Beyond Insurance	Trusted Risk Advisor Certification (4 classes for minimum investment of \$1,600)	\$400 per class
	American Insurance Marketing and Sales (AIMS) Society	CPIA Designation (3 classes for minimum investment of \$567)	\$189 per class
	The National Alliance	CRM - Certified Risk Manager (5 classes for minimum investment of \$2,150)	\$430 per class
	International Risk Management Institute, Inc.	AFIS Certification - Agribusiness and Farm Insurance Specialist (5 classes for minimum investment of \$675)	\$135 per class

	The Institutes	AAI Designation - Accredited Advisor In Insurance, The Institutes 3 courses + Ethics Total Requirements: 4 3-6 Months to complete	Materials: \$150 to \$265 Exam: \$155 to \$185
CHECK HERE	ORGANIZATION	EVENT	INVESTMENT
	OIA	Next Gen Summit	\$200 Registration
	OIA	IACON	\$250 Registration
	OIA	Advocacy Day	Up to \$189 if hotel stay is needed
	Big I	Big I Legislative Conference	Registration and Hotel
	Big I	Big I Fall Leadership Conference / Young Agents Leadership Institute	Registration and Hotel
	Big I	Agents Council on Technology Meetings	Registration and Hotel

Important Notes:

- A scholarship will only be granted if there is an educational 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 awarded for Agency Operations Education are applied to future services only.
- Scholarships for designations will be awarded for one class at a time. The applicant can reapply for subsequent classes using the same application.
- The scholarship is non-transferable and will only be applied to the agent to whom it was awarded.
- The scholarship awarded may be less than the amount requested.