



## Application & Guidelines

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## CPD Guidelines

This sheet attempts to answer some Frequently Asked Questions. Additional questions about completing the application or how to count an activity may be answered by calling (610) 644-2100, ext. 7360 or sending an e-mail to [cpd@cpcuiia.org](mailto:cpd@cpcuiia.org).

**Note:** CPD is a voluntary program that is used to recognize CPCUs for their continued attention to professionalism.

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## How to Become CPD Qualified

Please check your category to determine what you need to do:

Your CPD Status	You Earn Points	Qualification Period
New Designee (no need to file)	Automatic by having completed CPCU	2 years from eligibility to use the CPCU designation
Not currently qualified (either expired or never qualified)	In the 2 years preceding date of application	2 years from month of application
Currently Qualified	Only during the period of current qualification	Add 2 full years to current expiration

## Examples

CPD Status	Applied	Qualified Through
New Designee	September 2005 completer January 2006 completer June 2006 completer	November 2007 March 2008 August 2008
Not currently qualified	January 2005	January 2007
Currently qualified	Currently qualified to December 2005 and submitted new application in November 2005	December 2007

**NOTE: Documentation is not required for individual activities that are submitted for credit on the CPD application. CPD submissions are randomly audited and CPCUs may be asked to document any activity that is submitted on a CPD application.**

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## Specific PD Sections

All work must be completed before it is eligible for submission on the CPD Application.

PD-1: All IIA, retakes of CPCU, CLU, FLMI, ChFC, RHU, CIC designation exams.

All business-related courses, such as M.B.A., Master's, Financial, Information Systems.

American Educational Institute (AEI) (40 points for completion of entire module, 12 ½ points for each exam, maximum 40 points). All non-designation courses such as SM, INTRO earn 15 points. L/H pre-licensing and licensing courses/exams earn 15 points. No points earned for P&C pre-licensing/licensing courses/exams.

PD-5: CPCU Society Center for Leadership courses offered at CPCU Society Annual Meeting based on number of hours (in addition to Annual Meeting attendance). NAIC—must attend all four meetings to earn 10 points.

PD-6: All seminars, workshops, and lectures attended to meet CE requirements. Please provide sponsoring organization, topic, and program length. You may claim either I-Day attendance **or** the CE earned at the I-Day session, not both. Ruble Seminars and CIC Institute updates (if you did not take or pass the exam) count for 15 points.

**FOR INSTITUTE USE ONLY**

Rec'd \_\_\_\_\_ Init. \_\_\_\_\_  
C/Y \_\_\_\_\_ C/N \_\_\_\_\_ N/N \_\_\_\_\_ Paid \_\_\_\_\_ Cert. Ordered \_\_\_\_\_  
QUAL. \_\_\_\_\_ Expired \_\_\_\_\_

☐ New  
☐ Renewal \_\_\_\_\_ Date of application \_\_\_\_\_

# APPLICATION

Name \_\_\_\_\_ Soc. Sec. No. \_\_\_\_\_  
Last First Middle

Employer \_\_\_\_\_ Business Telephone \_\_\_\_\_

Address \_\_\_\_\_ I am a member of the following chapter: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Designation Year: \_\_\_\_\_

Preferred address:

☐ Business ☐ Home ☐ Please check if change of address E-mail Address: \_\_\_\_\_

**To qualify, you must earn 60 points during the previous two-year period. Please check the facing page prior to completing this form.**

*Leave shaded area blank*

Professional Development Activity	Activity Details	Date	Points Requested	Points Approved
<b>PD-1 PASS</b> <b>Exam</b> <ul style="list-style-type: none"> <li>AICPCU/IIA or actuarial exams—45 points each</li> <li>Other exams related to nationally known insurance designation or business-related program (40 points per exam)</li> <li>Non-designation exams—15 points. (Does not include licensing or pre-licensing P&amp;C exams)</li> </ul> <b>Course/Exam</b> <ul style="list-style-type: none"> <li>College or University accredited course in insurance, risk management, or business related subject (12 ½ points per credit).</li> </ul>	Provide exam, designation associated with, and date of completion or course name, college or university, date and number credits earned.			
<b>PD-2 TEACH (other than for current position)</b> <ul style="list-style-type: none"> <li>A complete course of types shown in PD-1 (30 points for Institutes' course, 25 points all others—once per semester; pro-rata allocation of at least 1/3 taught).</li> <li>Serve as instructor, speaker, or moderator for seminars, workshops, educational meetings, etc. (points are based on number of classroom hours, maximum 25 points)</li> </ul>	Provide course name, date, and sponsor's name.			
<b>PD-3 AUTHOR OR COAUTHOR</b> <ul style="list-style-type: none"> <li>Article accepted for publication in <i>CPCU eJournal</i>, interest group newsletter, or similar business publication (25 points)</li> <li>Article accepted for publication in Chaptergram or chapter web site (15 points)</li> <li>Chapter research project chairman (30 points)/ participant (25 points)</li> <li>Textbook (60 points)</li> <li>Revisions of same (25 points)</li> </ul>	Provide title, edition, publication date, number of pages.			
<b>PD-4 SERVE</b> <i>(continued on reverse)</i> <ul style="list-style-type: none"> <li>As a volunteer for the CPCU Society or another insurance organization. (15 points per year—must complete term)</li> </ul>	Includes officers, board member, leader, coordinators, task force activities.			

Professional Development Activity	Activity Details	Date	Points Requested	Points Approved
<b>PD-4 SERVE</b> <i>(continued)</i> <ul style="list-style-type: none"> <li>• Program/class coordinator for CPCU Society chapter or course-sponsoring organization (15 points per year)</li> <li>• Member of State Insurance Advisory Committee (15 points per year)</li> <li>• AICPCU grader (10-15 points per exam series—maximum 45 points)</li> <li>• AICPCU question writer (10-20 points per writing assignment, overall maximum 40 points)</li> <li>• AICPCU question reviewer or Exam Review Committee service (20 points per year)</li> <li>• Other insurance organization exam question writer (15 points per year)</li> <li>• Other insurance organization question reviewer or Exam Review Committee service (15 points per year)</li> <li>• Other activities that should be considered (with explanation)</li> </ul>	Describe activity.			
<b>PD-5 ATTEND NATIONAL EDUCATION MEETINGS</b> <ul style="list-style-type: none"> <li>• CPCU Society Annual Meeting and Seminars (20 points)</li> <li>• Annual meetings of other national insurance organizations—CLU, LOMA, IIABA, IRIS, ACORD, IVANS, RIMS, ARIA, etc. (10 points)</li> </ul>	Provide sponsoring organization and dates.			
<b>PD -6 ATTEND CPCU SOCIETY CENTER FOR LEADERSHIP COURSES, TECHNICAL WORKSHOPS/SEMINARS/CE COURSES</b> <ul style="list-style-type: none"> <li>• CPCU Society Center for Leadership Course (earn 1 point per contact hour)</li> <li>• CPCU Society chapter meetings that include a speaker or educational program (15 points/year)</li> <li>• Industry Day (I-Day) earns 4 points</li> <li>• Workshop/Seminar/CE course earn 1 point per contact hour</li> </ul>	Indicate sponsoring organization, topic, and program length. List date of seminar and number of CE credits.			
<b>PD – 7 PERFORM</b> <ul style="list-style-type: none"> <li>• Expert witness (10 points per year; 20 points maximum)</li> <li>• Personal Sponsorship (5 points; 10 points maximum); company liaison in Personal Contact Campaign (10 points maximum)</li> </ul>	Provide appropriate explanation.			

### Certificates are optional.

The cost of a certificate is a one-time fee of \$25. Thereafter, stickers for updating qualification periods will be mailed free of charge at renewal.

- ☐ I request a certificate. Enclosed is my check for \$25 made payable to The American Institute.
- ☐ I do not want a certificate.
- ☐ I request a sticker for updating qualification periods.
- ☐ If you would prefer to have your certificate mailed to your employer for presentation, please provide us with the following information:

Company Name:

Attn:

Address:

Full name as you wish it to appear on your certificate: \_\_\_\_\_, CPCU

Type or Print

I certify that the above statements are complete and true and are made in full compliance with the Codes of Professional Ethics of the American Institute for Chartered Property Casualty Underwriters and the CPCU Society. I understand that CPD applications are randomly audited and I may be asked to document any activity I submitted on this form.

Signature of applicant required

Date

Send completed form to: **Continuing Education; American Institute for CPCU; 720 Providence Road, Suite 100; Malvern, PA 19355-3433**