
WEEK 3 AT A GLANCE: CARRIER AND AGENCY/BROKERAGE FINANCIALS

OVERVIEW: This unit provides an overview of carrier and agent/broker financials.

OBJECTIVES:

- Become more fluent in the language of insurance industry finance
- Better understand the key financial statement
 - Income Statement
 - Balance Sheet
- Practice application through financial transactions (boardgames)
 - Carrier
 - Agency/Brokerage
- Learn about key insurance industry financial ratios
- Practice analyzing insurance company annual reports

WEEK 3 – JUNE 28 – JULY 5, 2021

Topics/Activities		Approximate Time	Date/Complete By
Online/Self-Paced	Live Virtual Instructor Led		
Pework: Download/Print Document for Live Virtual Session 1		5 minutes	June 29
Attend Live Virtual Session 1	Attend live virtual session	90 minutes	June 29
Pework: Download/Print Document for Live Virtual Session 2		5 minutes	July 1
Attend Live Virtual Session 2	Attend live virtual session	90 minutes	July 1
Reflection/Action Plan		10 minutes	July 2