

Insurance Broker Career Flow Chart

Insurance Is A Challenging Career That Provides A Variety of Constant Interest And Great People.

CSR

A CSR (Customer Service Representative) provides support to clients, brokers, administrative staff, and management.

Broker

A Broker is a licensed salesperson who acts as an intermediary between clients and insurance companies. Brokers use their in-depth knowledge of insurance products, their assessment of risks and the insurance market place to arrange suitable insurance coverage for their clients. Brokers continue to support their client's insurance needs throughout the year.

Owner/Manager

An Owner/Manager provides leadership and deals with human resource issues. Management controls the financial aspects of the brokerage and ensures daily business functions run smoothly.

Education

- *Fundamentals of Insurance*
- *Customer Service for the Insurance Professional (CSIP)*
- *Introduction to Risk Management (IRM)*
- *Relevant Seminars*

Education

- *Canadian Accredited Insurance Broker (CAIB)*
- *Canadian Professional Insurance Broker (CPIB)*
- *Relevant Seminars*

Education

- *Canadian Accredited Insurance Broker (CAIB)*
- *Canadian Professional Insurance Broker (CPIB)*
- *Canadian Certified Insurance Broker (CCIB)*
- *Best Practices*
- *Relevant Seminars*