



Annual Statement Investment Schedules Online

September 14-21, 2009 • October 26-November 2, 2009 • December 14-21, 2009

Are you responsible for reporting your company's investments? Can you use some help in better understanding Schedules A, B, BA, D, DA and E? Do you want to hear about the 2009-2010 changes? Then you should plan to enroll in *Annual Statement Investment Schedules Online*. Our subject matter expert, Becky Fuller, an insurance reporting analyst with the NAIC, will be with you throughout the course to provide reporting guidance and answer your questions. Use this training opportunity to learn what you need to know in order to accurately report your company's investments.

Learning Outcomes

At the completion of this course, you will be able to:

- Correctly classify invested assets
- Complete the invested assets reporting formats (owned, acquired, disposed)
- Learn how the investment information flows through the annual statement
- Recognize 2009-2010 statutory changes to the investment schedules
- Identify the different types of securities insurance companies invest in

What Others Have Said

"The variety of learning methods was great. And I really like being able to come and go at my own pace and timing."

"Overall this course is outstanding: content, instruction, format, material."

Why Should I Enroll?

Annual Statement Investment Schedules Online is structured to allow you to access the course 24 hours a day, so you have flexibility in planning your study schedule throughout the week. As a participant, you will enjoy a number of benefits, including:

—An *Annual Statement Investment Schedules* course guide, containing comprehensive study and reference materials

—One-on-one virtual interaction with a subject-matter expert who regularly works with the investment schedules

—Opportunities to network with other industry professionals from across the country

—A new or enhanced set of skills in completing the investment schedules



National Association of Insurance Commissioners

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Tuition

- \$295 for State/U.S. government employees
- \$595 for all others

Tuition includes assistance from a subject matter expert, comprehensive course materials, password access to the course, continuing education materials (upon request and successful completion), the opportunity to learn and connect with others from across the country, and a 24/7 Help Desk for technical assistance.

About Learning Online

Plan to spend at least two hours a day on this course. Online courses offer great flexibility but also require self-motivation, commitment, good time management skills, and space in which to study. So be sure to plan accordingly. At www.naiconline.org, you'll find a short quiz to help you decide if learning online is the right fit for you. At this website, you'll also be able to check the technical requirements for your PC or laptop. *Note: RealPlayer, a free download, is required to listen to the lectures.* The week preceding the course, you will receive materials, including the Handbook for Distance Learners, sent to the mailing address you supply on the registration form.

Continuing Education

Continuing education materials are sent upon request and based on successful completion of the course (refer to course syllabus for completion requirements). Six (6) hours will be listed on continuing education materials for this one-week online course.

Cancellations

Withdrawals for full refund are permitted up to three weeks before the beginning date of the course; cancellations after this date will result in no refund. Notification of cancellation must be received in writing. If issued, refunds will be mailed after the completion of the course. Substitutions are accepted up to one week before the course begins.

REGISTER online at www.naic.org/education_home.htm or complete and return the registration form below by **August 24** for the September session, **October 5** for the October/November session, or **November 23** for the December session. Space is limited so you are encouraged to register early. You will be contacted via e-mail with confirmation of your registration, your password, and login information.

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- Sept 14-21
- Oct 26-Nov 2
- Dec 14-21

FAX TO:
(816) 460-7544

MAIL TO:
NAIC Education & Training
Post Office Box 870335
Kansas City, MO 64187-0335

FED-EX/AIR MAIL ADDRESS:
UMB Bank
Attn: Wholesale Lockbox, 6th Floor
Box 870335
928 Grand
Kansas City, MO 64106

www.naic.org/education_home.htm

Name: _____

Title: _____

State/Organization: _____

Address (No PO Boxes): _____

City: _____ State: _____ Zip: _____

Phone: _____ E-mail: _____

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- \$595 All others

Payment Method

- Check or Money Order payable to the NAIC (Payment must accompany registration form)
- Zone Funds (State Ins. Dept. Staff only)
- Grant Funds (State Ins. Dept. Staff only)
- Scholarship (State Ins. Dept. Staff only)
- Credit Card (We will contact you by phone to obtain payment information)